

ADVANCING EQUITY & UHNW PHILANTHROPY: FINAL PRESENTATION

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**START
CENTER**

STRATEGIC ANALYSIS,
RESEARCH & TRAINING CENTER

Department of Global Health | University of Washington

PROJECT TEAM



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START CENTER OVERVIEW



Leverages leading content expertise from across the University of Washington



Provides high quality research and analytic support to the Bill & Melinda Gates Foundation and global and public health decision-makers



Provides structured mentorship and training to University of Washington graduate research assistants

AGENDA

01

Project Overview & Objectives

02

Methodology

03

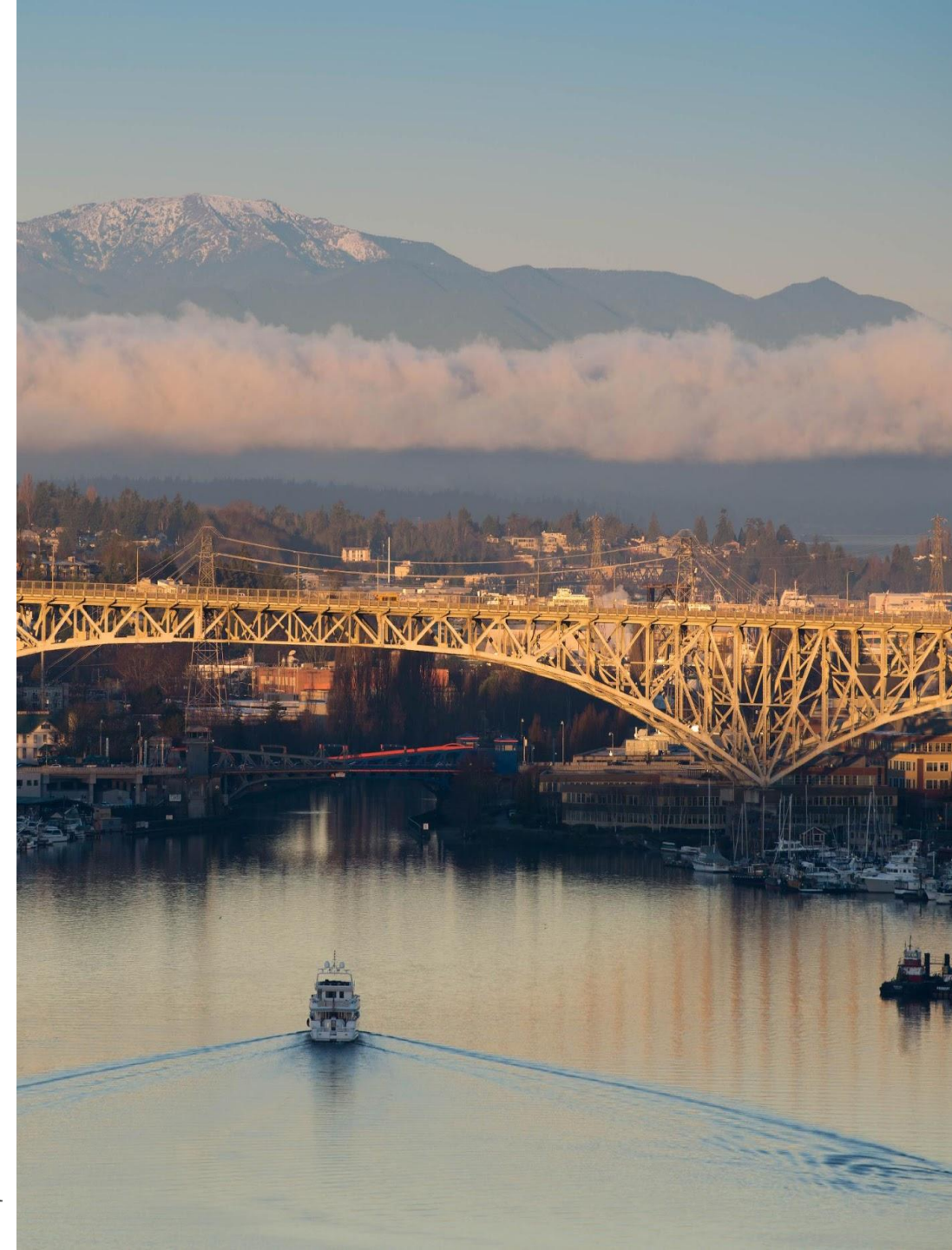
Results

Field Definitions

KII Themes

04

Synthesis & Recommendations



PROJECT OVERVIEW

PPT STRATEGY REFRESH

- **Pivot away** from being issue-agnostic
- Understand and encourage **giving that promotes equity**

THE CHALLENGES

- Need more **durable and expansive** definitions of “equity giving”
- Current definitions allow **under/overrepresentation** of progress
- **Low consensus** on where philanthropic dollars will have greatest impact

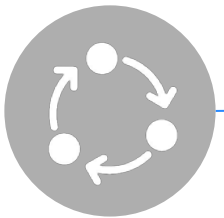
PROJECT OBJECTIVES



To produce a **set of definitions** that capture core types of equity giving: racial equity, gender equality, and SDG-aligned giving



To understand where there is space for **global alignment** within equity giving definitions, specifically in India and China



To explore where in the **philanthropic lifecycle** these definitions should be applied and measured against

METHODOLOGY

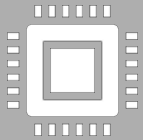
THE APPROACH



Literature Review (Field Definitions)



Key Informant Interviews



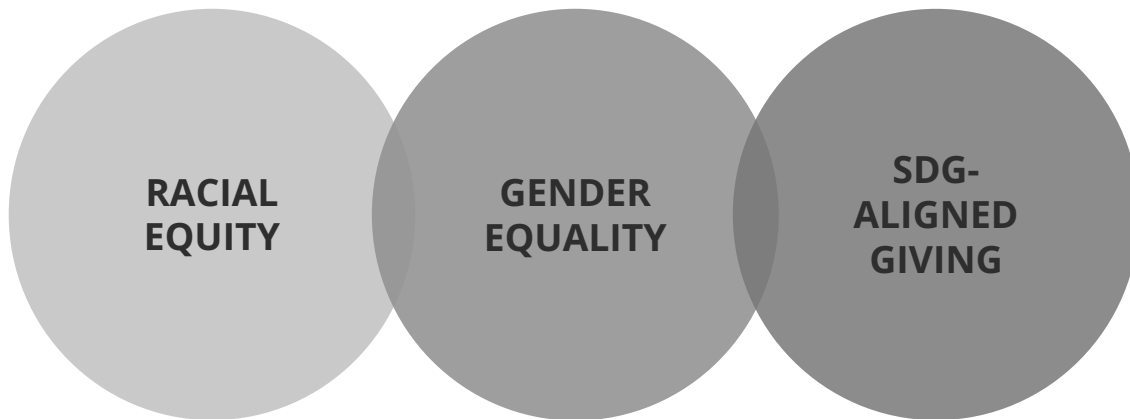
Analysis & Synthesis



Final Recommendations

FIELD DEFINITIONS

THE “CORE GIVING TYPES”

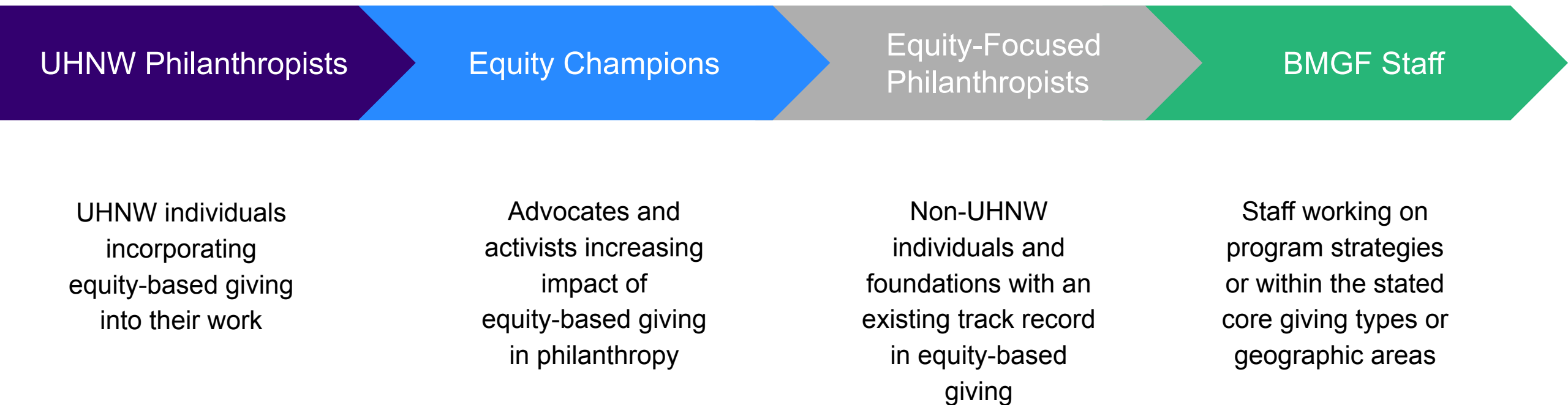


THE SOURCES

- 01 Philanthropic Institutions
- 02 Bilateral Organizations
- 03 Consulting Groups
- 04 Think Tanks

KEY INFORMANT INTERVIEWS

KII “BUCKETS”



START Team conducted **12 interviews** in August 2022

SYNTHESIS



*Separated by Concept Area (Racial Equity, Gender Equality, and SDG-Aligned Giving)

RESULTS

FIELD DEFINITIONS

RACIAL EQUITY

FIELD DEFINITIONS: SOURCES & CHARACTERISTICS



Grantmakers in the Arts
Supporting a Creative America



W.K.
KELLOGG
FOUNDATION



THE ANNIE E. CASEY FOUNDATION



skoll
FOUNDATION



01

Included in DEI statements

02

“Justice” and “Healing” as action approaches

03

Both an intersectional approach and an independent strategy

04

US based, with adaptations for structures that challenge disparities globally

RACIAL EQUITY

FIELD DEFINITIONS: SOURCES & CHARACTERISTICS

Racial Equity

Descriptive definitions

Focus on racism and structural inequalities

Usually outcome-based

Centers around POC

Racial Justice

Requires landscape and strategy analysis

Focus on inclusive practices and reinforcement of an equitable approach

Action-based

Centers around POC

Racial Healing

Reflection and action-based definition

Focus on reparation and acknowledgement of a racist society

Group approach

Transfers agency to POC to own their journey

RACIAL EQUITY

FIELD DEFINITIONS: SOURCES & CHARACTERISTICS

Racial Equity is embedded as a central strategy to many foundations. Focus areas include:



Criminal Justice Reform
Voting Rights
Power Building
Economic Opportunity
Art, Culture & Narrative



Proximate Solutions
(Indigenous Communities)
Civic Participation
Elevating Voices & Narratives

**Thousand
Currents**

Food Sovereignty
Economic Justice
Climate Justice



FORD
FOUNDATION

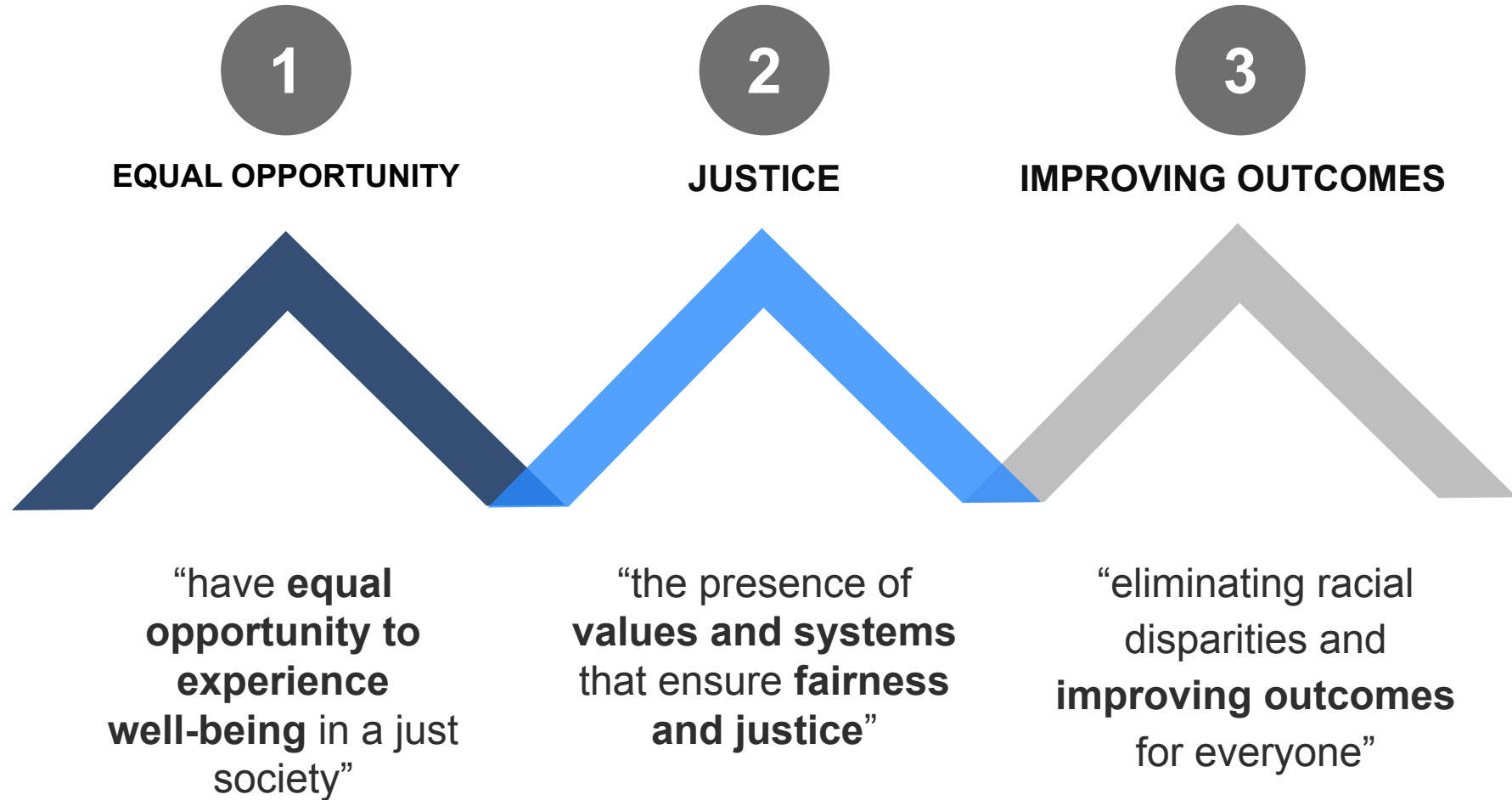
Immigrant Rights
Criminal Justice
Power Building
Reproductive and Gender
Justice
Gender-based Violence



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RACIAL EQUITY

FIELD DEFINITIONS: SOURCES & CHARACTERISTICS



RACIAL EQUITY

FIELD DEFINITIONS: EXAMPLES

“**Racial equity** (or racial justice) is the **systematic fair treatment of all people**, resulting in **fair opportunities** and **outcomes for everyone**. Racial equity is not just the absence of discrimination but also the presence of **values and systems** that ensure **fairness and justice**. Systematic equity, which affirmatively and continually supports and ensures the fair treatment of all people, is needed to supplant the system of racism.”

Annie E. Casey Foundation

“**Racial equity** is an aspirational pursuit insisting that **all people** (...) will have **equal opportunity** to experience well-being in a just society. Achieving racial equity means that an **individual’s identity would not be predictive of their day-to-day experiences** or their life outcomes. Racial equity is a two strand approach that focuses on **systems transformation** and **racial healing** (...)”

W.K Kellogg Foundation

GENDER EQUALITY

FIELD DEFINITIONS: SOURCES & CHARACTERISTICS



European Institute
for Gender Equality



Emphasizes that equitable opportunities are a human right



Definitions are contextually and organizationally dependent



Targets a systems shift in gender norms and societal expectations placed on those who identify as women



Cannot be achieved in a silo and must address other underlying societal standards

GENDER EQUALITY

FIELD DEFINITIONS: SOURCES & CHARACTERISTICS

Gender **Equity**

Accounts for differences between people and the uneven playing field

Process-focused

Ensures equal chance at both starting point and finishing line

Often requires built-in measures to compensate for historical and social disadvantages

Gender **Equality**

Men and women are not the same, but do have equal value

Outcome- and impact-based

Measurable and equal political representation, status, rights and opportunities.

Recognizes that all human beings are free to develop their personal abilities, without the limitations set by stereotypes and prejudices

GENDER EQUALITY

FIELD DEFINITIONS: SOURCES & CHARACTERISTICS

Gender Equity is embedded as a central strategy to many foundations. Focus areas include:



Education
Women's health & safety
HIV/AIDS
Maternal & Child Health
Women's economic & political empowerment



Access to basic services
Women's social and economic development
Sustainable livelihoods and ecosystems
Emergency response



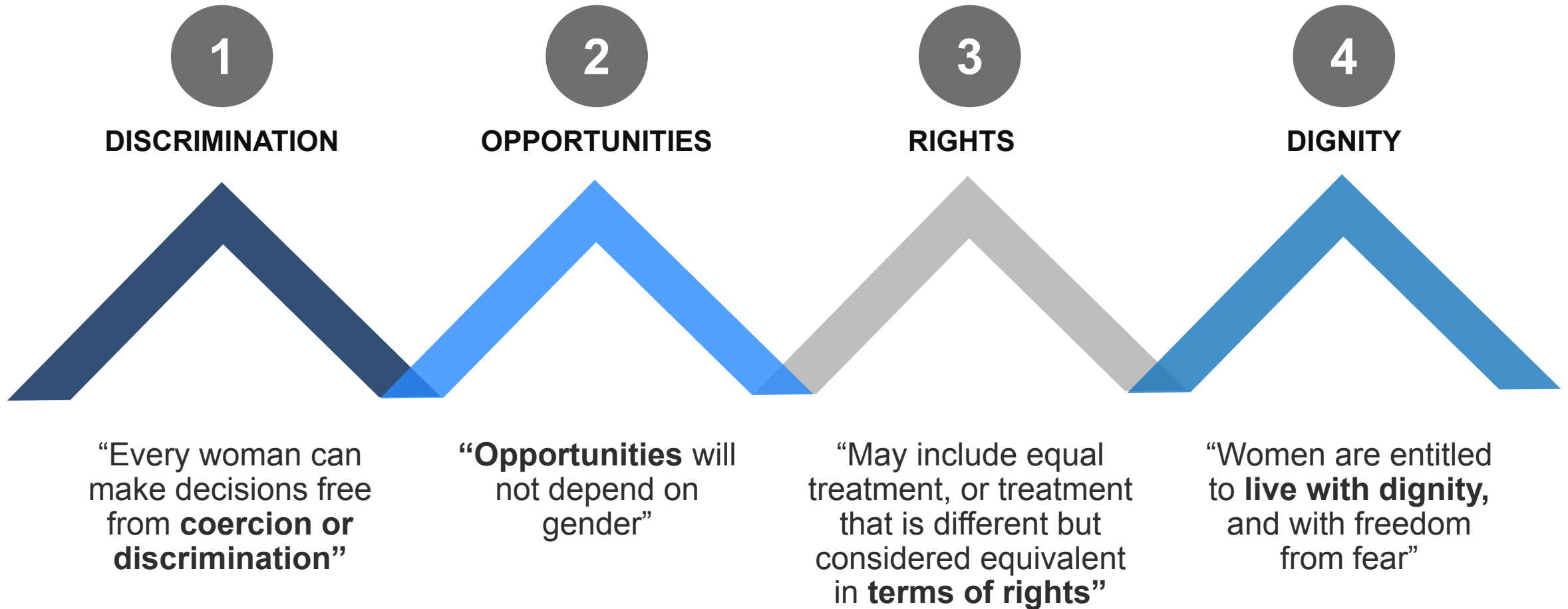
Enhance societal consciousness on gender inequality
Empowerment of women and youth
Prevent violence on women



Women in leadership
Gender based violence
Income security
Benefit equally from prevention against natural disasters

GENDER EQUALITY

FIELD DEFINITIONS: SOURCES & CHARACTERISTICS



GENDER EQUALITY

FIELD DEFINITIONS: EXAMPLES

“To create a society based on equality and justice with **no discrimination** based on caste, gender, class, religion, ethnicity, sexual orientation, and age, amongst other factors.”

CORO India

“This refers to **measurable, equal political representation, status, rights and opportunities.**”

Just Associates (JASS)

“Gender equality entails the concept that all human beings, both men and women, are **free to develop their personal abilities and make choices without the limitations set by stereotypes, rigid gender roles or prejudices.**”

The Global Fund

“The concept that women and men, girls and boys **have equal conditions**, treatment and opportunities for realizing their full potential, human rights and dignity, and for contributing to (and benefitting from) economic, social, cultural and political development. “

UNICEF

SDG-ALIGNED GIVING

FIELD DEFINITIONS: SOURCES & CHARACTERISTICS



01

SDGs are all-encompassing

02

Highly intersectional and interconnected

03

Encourages “systems-change” approach

04

Pre-existing targets and indicators

SDG-ALIGNED GIVING

FIELD DEFINITIONS: SOURCES & CHARACTERISTICS

Traditional “Engineering” Approach

“Technical solutions: Implementable solutions to be controlled, quantified, and managed, creating predictable change.”

Narrow, focused, precise, and linear

Results- and solutions-oriented. Plans are designed with fixed timelines and defined outcomes.

Systems-Change Approach

“The process of shifting narratives, relationships, and power in order to foster equity and self-determination”

Messy and ambiguous. Systems may overlap, or be nested within one another

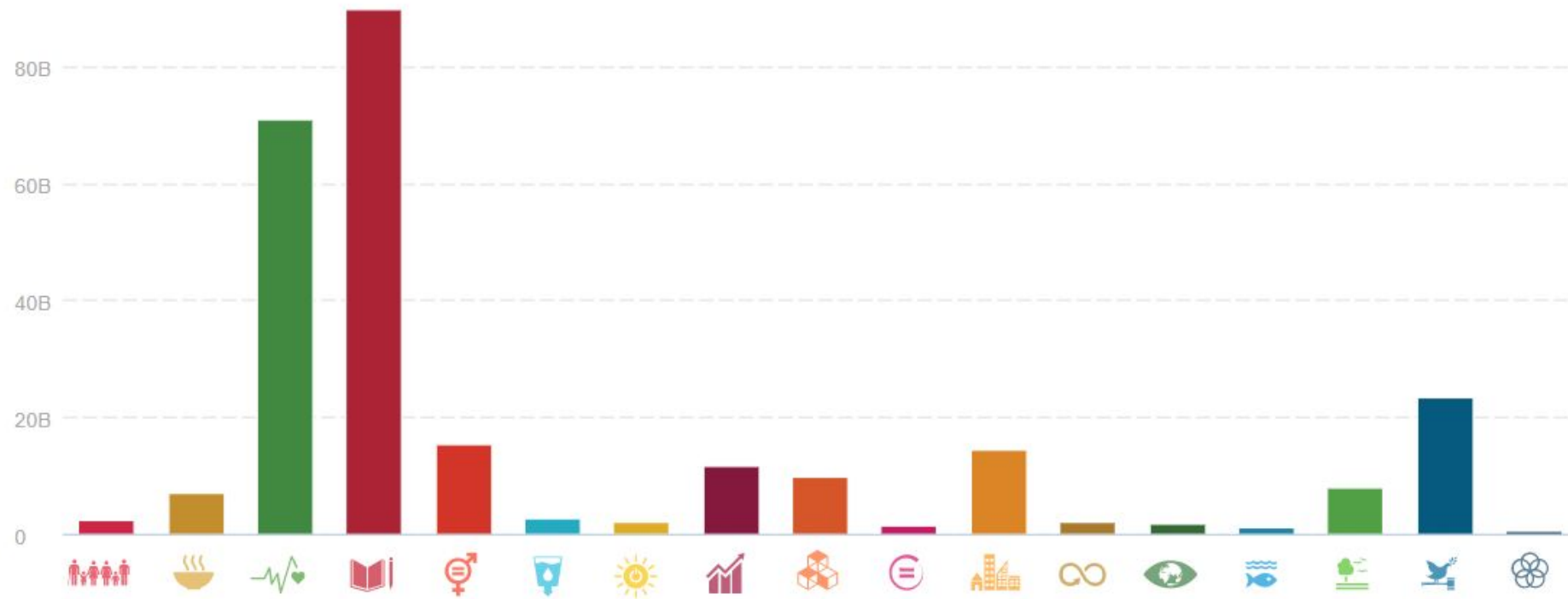
Vision-oriented. Transform the underlying power dynamics, narratives, and histories that enabled inequitable structures to thrive

“An equity lens is essential to avoid change efforts that reinstitute the status quo or replace one systemic inequity with another”

SDG-ALIGNED GIVING

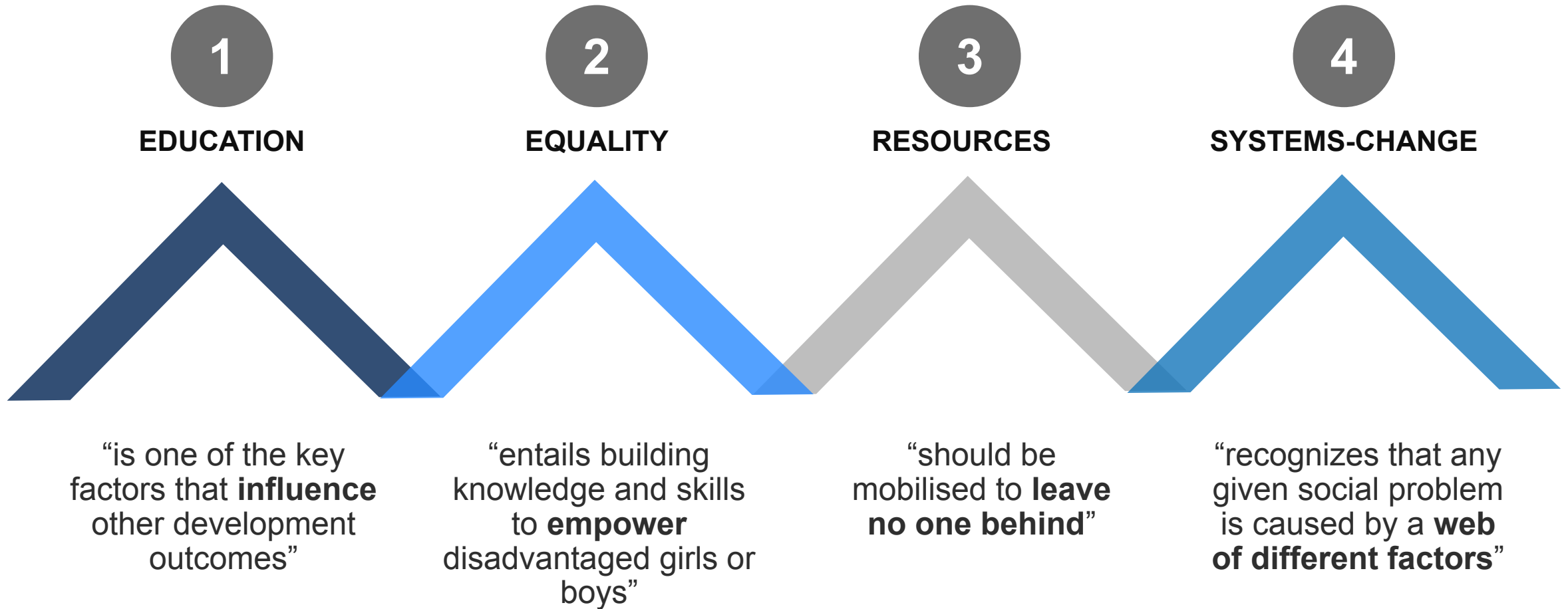
FIELD DEFINITIONS: SOURCES & CHARACTERISTICS

Distribution of Foundation Funding by SDG for 2016+



SDG-ALIGNED GIVING

FIELD DEFINITIONS: SOURCES & CHARACTERISTICS



SDG-ALIGNED GIVING

FIELD DEFINITIONS: EXAMPLES

“Sustainable development is development that **meets the needs of the present** without compromising the ability of **future generations** to meet their own needs... [It] is a **process of change** in which the exploitation of resources, the direction of investments, the orientation of technological development, and institutional change are **made consistent with future as well as present needs.**”

“Report of the World Commission on Environment and Development” UN, 1987

The stakes are twofold: The education of girls and women is, first, a **fundamental human right** and it is also an **essential lever** for sustainable development and peace.”

“Global Education Monitoring Report, Gender Report” UNESCO, 2019

“SDG alignment is... a value proposition for private sector to **preserve the long-term value of assets by doing no harm** and contributing solutions to sustainable development challenges... With regard to the **definition of alignment**, ...‘sustainable development investing refers to **deploying capital in ways that make a positive contribution** to sustainable development, using the SDGs as a basis for measurement.’ Yet beyond creating a net positive impact over the life of the investment, our ambition should also be to **aim that investment does no harm across the SDGs.**”

“Framework for SDG Aligned Finance” OECD, UNDP, 2020

KII THEMES

KEY INFORMANT INTERVIEWS

UHNW Philanthropists

Deepali Khanna
VP Asia Region Office,
Rockefeller
Foundation

Gautam John
Director of Strategy,
Nilekani
Philanthropies

Equity Champions

Degan Ali
Executive Director, Adeso

Una Osili
Associate Dean,
Research and International
Programs,
Indiana University

Sohini Bhattacharya
President & CEO,
Breakthrough

Woodrow Rosenbaum
Chief Data Officer,
Giving Tuesday

Equity-Focused Philanthropists

Stephanie Gillis
Director, Impact-Driven
Philanthropy Initiative,
Raikes Foundation

Naghma Mulla
CEO, Edelgive Foundation

BMGF Staff

Graham Snead
PO, Gender Integration

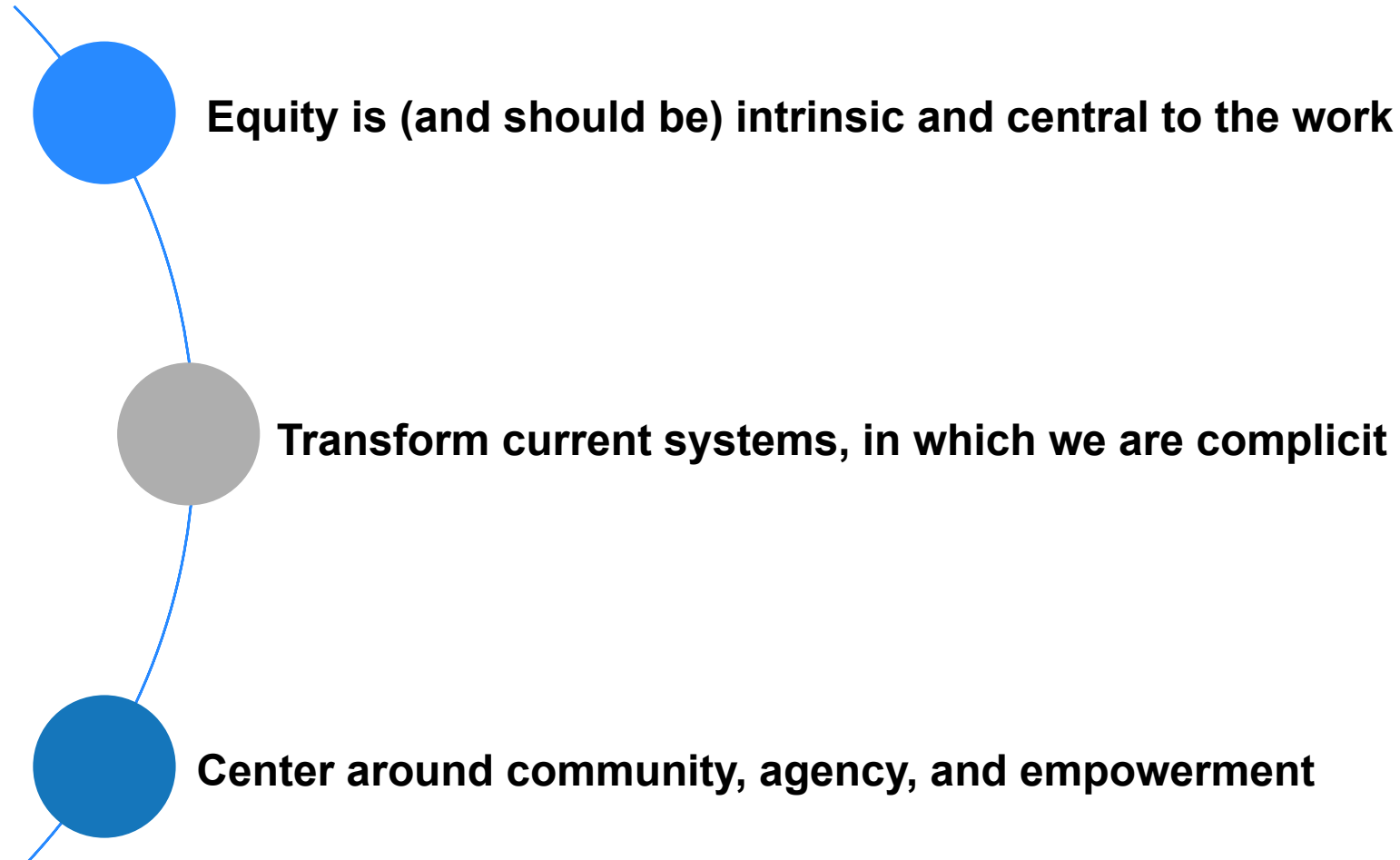
Ann Varghese
SPM, DEI Center of
Excellence

Akruti Desai
SPO, Philanthropic
Partnerships

Ruixi Hao
PO, Philanthropic
Partnerships

UHNW PHILANTHROPISTS

KII THEMES



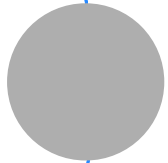
“Level playing field, how do you address the imbalances and make sure that you get to a point where there’s equal opportunity for everyone to be at that level. Talking about equal opportunity, but not everyone starts in the same place.”

EQUITY CHAMPIONS

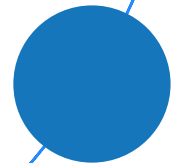
KII THEMES



Assessing root causes, aiming for equal outcomes, reducing systemic disadvantages, questioning leadership diversity



Support government capacity for sustainable development



**Funding as proximate and as indigenous as possible
Proximity should address inclusion of diverse voices**

“Equity from an academic perspective should be broad to include population served, outcomes, policies, communities, processes and structures that lead to inequalities (...) more compelling definitions bring a holistic perception and include gender, race or disability”

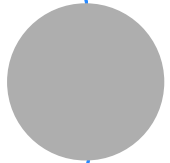


EQUITY PHILANTHROPISTS

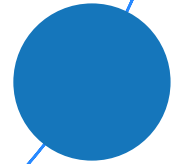
KII THEMES



**Systems and systems-change as a criteria for grant-making
“Perfectly executable grants” can detract from impact**



**Messaging and language is critical to buy-in
“Equitable partnerships will lead to equitable results”**

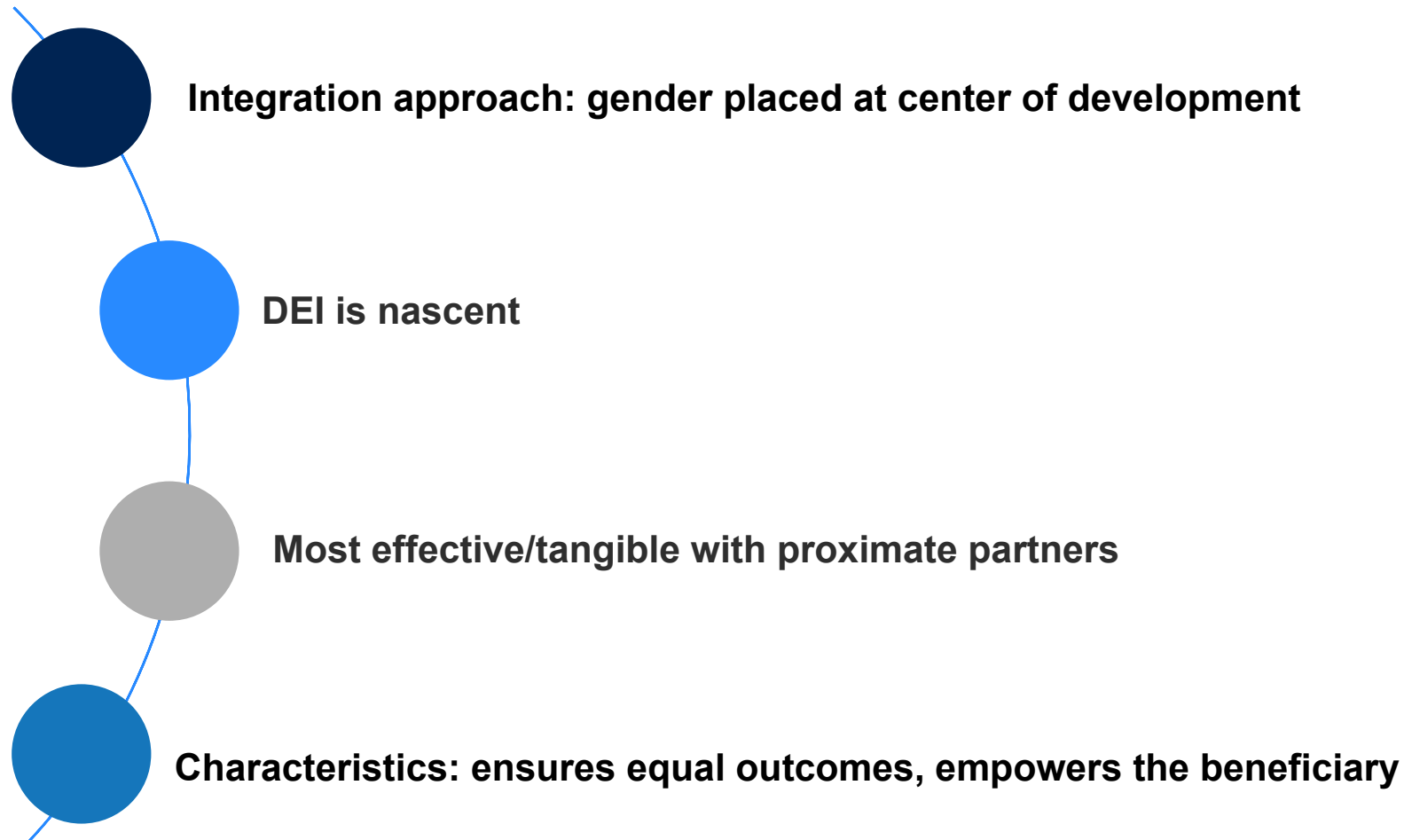


**Pooled resources and platforms for shared successes
Based on “commonalities and complementarities”**

“Philanthropy did a lot to build up infrastructure and knowledge-sharing, there are affinity groups and networks that exist for staff. However it didn’t exist for donors... What role might we play in making this ecosystem more connected, equitable, visible and accessible to donors?”

GATES FOUNDATION STAFF

KII THEMES



“In the end, equity giving should create awareness in the donor community to foster systemic change and ensure to tackle societal inequities”

SYNTHESIS & RECOMMENDATIONS

DEFINITIONS: RACIAL EQUITY

SYNTHESIS OF CHARACTERISTICS & THEMES

We recommend that a definition of ***racial equity*** includes the following concepts ...

- Acknowledges current and historical oppressive systems that have created an unequal distributions of burdens and benefits.
- Racial equity strives for new social norms that are just and fair; it ensures an equal opportunity and improve outcomes for everyone.
- Provides a holistic perspective of race and ethnicity.

Racial equity as it relates to funding ...

- It focuses on *race* (non white individuals) and *ethnicity*; especially those who have been marginalized. Those who are being served should be placed in the center and included in the conversation to create agency and sustainable change.
- It is central to an organization's approach, and includes actions and possible approaches. It focuses on inclusive practices, reinforcement of an equitable approach and reparations.

DEFINITIONS: RACIAL EQUITY

FINAL RECOMMENDATIONS

Racial equity refers to an approach looking at the **process** or **outcome** resulting from the systematic fair treatment of all people. It strives for a society with equal distribution of benefits and burdens. This approach is; active about **acknowledging the damage caused by racism**, based on the **analysis of disparities**, **restores individuals and communities wholeness** and **creates awareness at the donor, organizational and beneficiary** level about the issue and the solution. The end goal is fair opportunities and outcomes for everyone.

DEFINITIONS: GENDER EQUITY

SYNTHESIS OF CHARACTERISTICS & THEMES

We recommend that a definition of ***gender equity*** includes the following concepts ...

- A thorough understanding of the historical and contextual factors, including modern social norms, historical discrimination, and inequitable power dynamics; with consideration as to how these concepts have come to marginalize those who identify as women
- Gender equity must actively work to build a world in which all members of society are able to live free of discrimination and fear, have equal rights, benefits, obligations, opportunities, and outcomes

Gender equity as it relates to funding ...

- Invest in the priorities of women as described by the women themselves
- Give as proximately as possible, and create systems that are equipped to become financially independent and sustainable
- Equity giving is important at all stages of the philanthropic lifecycle but must be primarily focused on proximate giving

Remember that “gender equity is at the **heart** of gender equality,” and you cannot have one without the other.

DEFINITIONS: GENDER EQUITY

FINAL RECOMMENDATIONS

Gender equity is a process that involves differential treatment to ***fight historically imbalanced societal norms***. It recognizes that those who identify as men and those who identify as women have different needs and ensures that they are given ***fair and just*** treatment not only in the availability of opportunities but additionally in achieving outcomes. Gender equity cannot be achieved without a universal understanding of the way in which ***implicit privilege and power differentials*** influence both societal expectations and access to skills, education, and resources. It works towards a world in which people are free to live without fear, with dignity, and with agency to make their own ***decisions without discrimination***.

DEFINITIONS: SDG-ALIGNED

SYNTHESIS OF CHARACTERISTICS & THEMES

We recommend that a definition of ***SDG-aligned giving*** includes the following concepts ...

- An understanding that **many intersectionalities** are in play across all SDGs
 - thereby encouraging a systems-change approach for meaningful change
 - and a curiosity for understanding *all* of the factors that have given rise to inequalities, and how they are connected to each other
- Emphasis on **sustainability** and sustainable solutions:
 - “Preserve the long-term value of assets by doing no harm”
 - “Meeting the needs of the present without compromising the ability of future generations to meet their own needs”
- Goals, targets, and outcomes are set in alignment with the those already defined by the SDG framework, and measured in ways that allow effective comparison against other groups

DEFINITIONS: SDG-ALIGNED

FINAL RECOMMENDATIONS

SDG-aligned giving requires an effort to understand as many of the ***intersectionalities*** involved in addressing a particular inequality as possible. It does this by taking a ***systems-change approach*** to fighting inequalities, and by recognizing the ***interconnectedness*** of factors beyond the immediate scope of the effort. Goals, targets, and outcomes are set in alignment with the those ***already defined by the SDG framework*** (while being cautious and transparent of its limitations) and measured in ways that allow effective comparison against other groups. Lastly, it must maintain an emphasis on the ***long-term sustainability*** of any solution, and will achieve all of this by seeing ***external experts and proximate partners*** as core to the development of implementation plans.

COUNTRY-SPECIFIC INSIGHTS: INDIA



Racial

- The caste system and religious considerations are key when addressing racial equity

Gender

- Focus areas include gender-based violence, education, and gender norms
- In practice, equity and equality lack differentiation

SDG Aligned

- Focus areas include climate and sustainability
- Despite strong legislation, suboptimal implementation hinders progress
 - “India has good laws, but bad implementation”

COUNTRY-SPECIFIC INSIGHTS: CHINA*



Racial

- Not prioritized



Gender

- Focus areas include gender norms and family roles
- Still a nascent concept to Chinese philanthropy



SDG Aligned

- A primary focus, goals are driven by the government
- Focus areas include poverty and education

PHILANTHROPIC LIFECYCLE

“Should donating to a scholarship for women or other minority at Julliard be considered equity giving?”

The answer depends on the approach of the organization:



QUESTIONS & DISCUSSION

THANK YOU



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