

Advancing racial equity, diversity, and inclusion in philanthropy is a strategic priority for the United Philanthropy Forum (*Forum*). As part of these efforts, the *Forum* launched the **Racial Equity Capacity Assessment for PSOs** to help members assess their capacity to engage in racial equity work, track progress over time, and benchmark progress with their PSO peers. The assessment will also allow the *Forum* to track the progress of the network over time and identify critical needs and gaps in the network.

This profile summarizes your organization’s unique baseline data gathered through the Racial Equity Capacity Assessment completed for your organization. The information contained in this document should be used to support your organization’s advancement and inclusion of more racially equitable practices, policies, and culture. It is intended to catalyze conversations around racial equity both internally within the organization and externally via programming offered to other organizations. To supplement the learning, information on the aggregated standing of regional and national PSOs that completed this assessment is included throughout the profile.

At-A-Glance

This section presents a baseline snapshot of *Philanthropy West Virginia (Philanthropy WV)* internal and external self-reported racial equity practices, policies, and organizational culture compared to the average score of participating PSOs.

INTERNAL Racial Equity Practices, Policies, and Organizational Culture



Self-reported data from *Philanthropy WV* indicated their internal practices were in the **Emerging stage of development with an average of 2.1**. Their overall internal practices were the same as the overall PSO average of 2.1. *Philanthropy WV* rated itself higher, when compared to the average PSO rating, in *Organizational Learning Culture* and *Assessment and Data*. Conversely, it rated itself lower than other PSOs in *Board of Directors*, *Staff Leadership*, *Communications*, *Assessment and Data*, and *Operations*. Further details are provided in the following sections.

Internal Stages of Development
Not Started → 1 | Emerging → 2 | Establishing → 3 | Reinforcing → 4

EXTERNAL Racial Equity Practices, Policies, and Organizational Culture



Data indicated that *Philanthropy WV's* external programming practice focused on **referring members to external sources of information with an average score of 2.5** compared to a 2.2 average score across participating PSOs. The average external programming practice scores were higher in the domains of *Board of Directors*, *Staff Leadership*, *Assessment and Data*, and *Operations*. Conversely, *Philanthropy West Virginia* scored slightly lower than other PSOs in the domains of *Organizational Learning Culture* and *Community Engagement*.

External Level of Programming Offered by PSO
No programming offered → 1 | Refer Members → 2
Offer targeted programming → 3 | Organize + operate networking groups → 4

*A total of 1 individual assessments were completed for *Philanthropy WV*.
**The average scores presented throughout this Profile intended for benchmarking purposes are drawn from the data gathered from October – December 2019. The Racial Equity Capacity Assessment was re-opened January – February 2020 to include PSOs that were interested in completing the assessment. The final averages of all participating PSOs will be included in the final report.

Philanthropy West Virginia Racial Equity Capacity Assessment Profile Organizational Composition

This section provides a summary of the self-reported organizational diversity of the board, staff leadership, and staff as well as internal racial equity efforts underway. Where appropriate, comparison to the larger sample is provided.

Organizational Diversity



Board Members. *Philanthropy WV* indicated a board size of 14; the average board member size reported by other organizations was 15. *Philanthropy WV* also indicated that less than 25% of board members identified as people of color. This was like 21% of participating PSOs.

Senior Leadership. A total of 1 staff leadership staff were part of the organization, which was lower than the average of 3 across all participating PSOs. More than half (55%) of other organizations indicated they had 2 or fewer staff in staff leadership positions. There were no people of color in staff leadership positions at *Philanthropy WV*. This was comparable to approximately 41% of participating organizations.

Staff. The number of staff reported was 3 compared to an average of 12 across all participating PSOs. There were no staff who identified as people of color at *Philanthropy WV*. Approximately 21% of participating organizations also reported that none of their staff identified as people of color.

Internal Efforts Underway

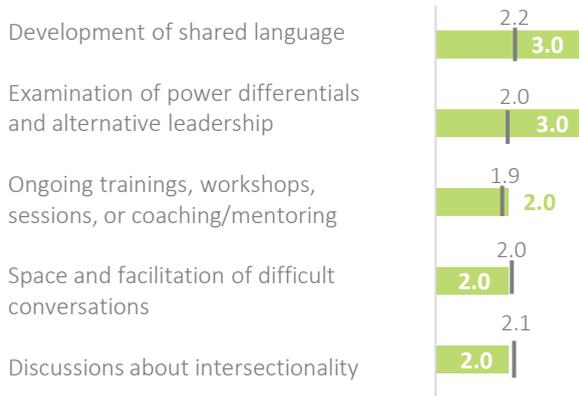
- *Philanthropy WV* indicated that they had not yet established goals, objectives, and/or strategies to advance racial equity efforts within the organization. By comparison, nearly two-thirds of other organizations indicated they had established goals, objectives, and/or strategies. For respondents who indicated the organizations had established goals to advance racial equity efforts, the primary driving factors included responding to community needs and to direction from their senior management, staff, and/or board.
- *Philanthropy WV* reported that they had convened internal workgroups, task forces, and/or change management process to guide and advance their racial equity work. When asked to specify, *Philanthropy WV* indicated that these processes were “*presently in formation.*” They elaborated, “*Philanthropy West Virginia’s board and staff has set equality and inclusion as a priority after several years of member training/programs on racial equity and inclusion. We are now diving deeper into this work as well as addressing these matters in a part of the nation that requires major outreach to reach diverse racial communities.*”

Philanthropy West Virginia
 Racial Equity Capacity Assessment Profile
 Internal Baseline Details

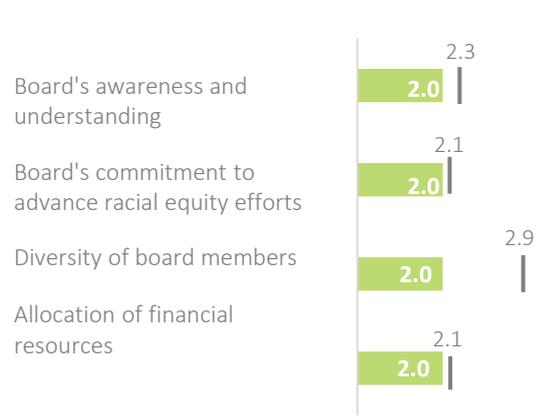
This section presents the self-reported rating details for the **six *internal*/dimensions** of racial equity practices, policies, and organizational culture.



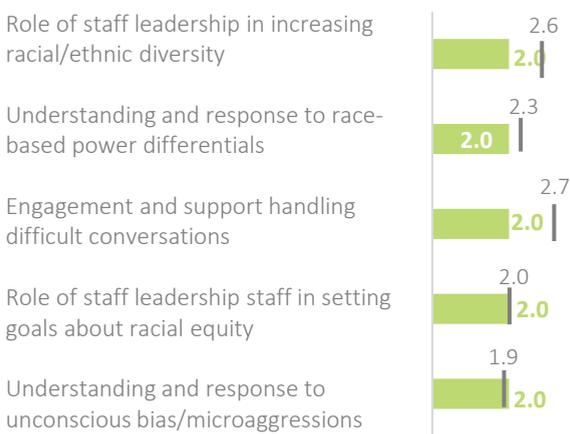
Organizational Learning Culture: 2.4 | 2.0



Board of Directors: 2.0 | 2.4



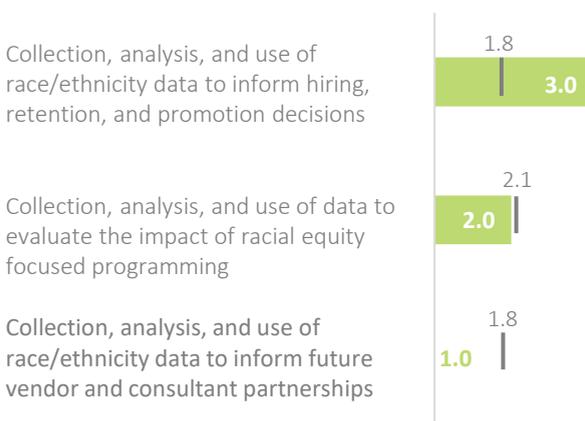
Senior Leadership: 2.0 | 2.5



Communications: 1.5 | 2.0



Assessment and Data: 2.0 | 1.9



Operations: 2.0 | 2.5



Philanthropy West Virginia

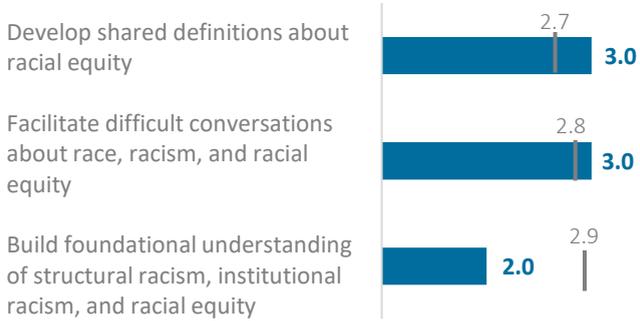
Racial Equity Capacity Assessment Profile

External Baseline Details

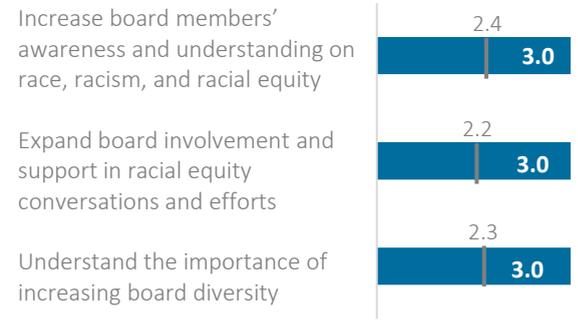
This section presents the self-reported rating details for the **six external/dimensions** of racial equity practices, policies, and organizational culture that PSOs use to support their member base.

- 1** No programming offered to support members in this area.
 - 2** Refer members to external sources of information to support them in this area.
 - 3** Offers members targeted trainings, workshops, etc. or bring in speakers and experts to provide support in this area.
 - 4** Organize and operate racial equity learning and networking groups that offer members opportunities to connect, share, and learn with colleagues in this area.
- | PSO Average

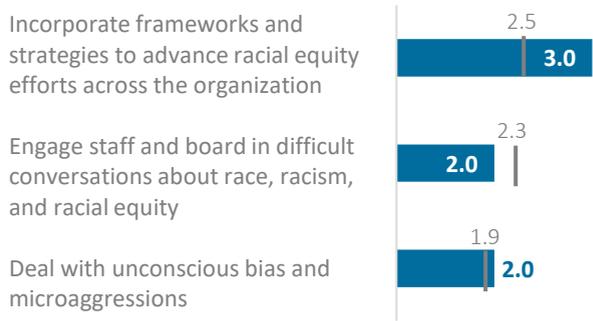
Organizational Learning Culture: 2.7 | 2.8



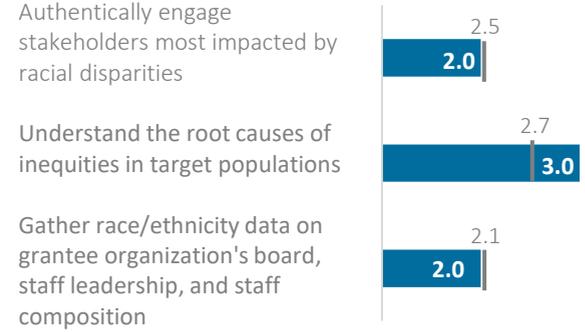
Board of Directors: 3.0 | 2.3



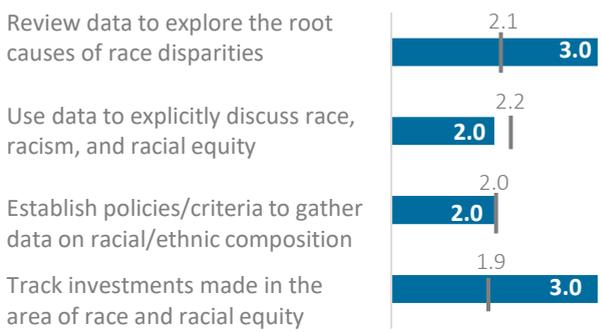
Senior Leadership: 2.3 | 2.2



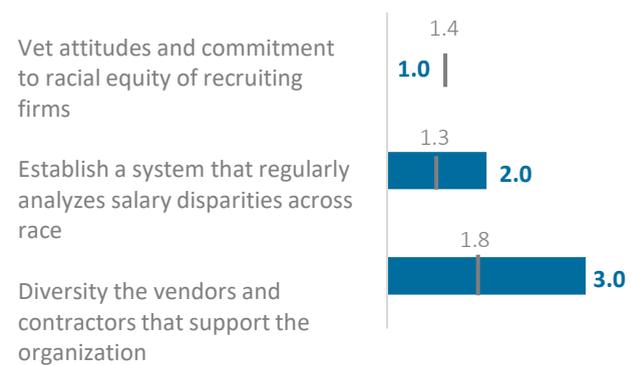
Community Engagement: 2.3 | 2.5



Assessment and Data: 2.5 | 2.1



Operations: 2.0 | 1.5



The last section of this Racial Equity Capacity Assessment Profile surfaces insights from the baseline data gathered and poses questions intended to support the ongoing learning and reflection about the organization's internal and external racial equity efforts. It is important to note that this section is not intended to be a thorough analysis or interpretation of the data gathered for the organization, but a starting point to catalyze thoughtful and *Philanthropy WV* conversations that lead the organization to concrete steps and actions.

Internal Efforts

Organizational Learning Culture

Philanthropy WV scored higher than other participating PSOs on their internal Organization Learning Culture efforts to advance racial equity. There may be opportunities to further focus on holding space for difficult conversations on the different facets of race, racism, and racial equity; examining power differentials and alternative leadership models; and, holding discussions about intersectionality.

Board of Directors

Philanthropy WV self-reported a lower average across this domain when compared to other participating organizations. Areas of opportunity may include supporting the board's understanding and awareness of racial equity efforts, commitment to advance racial equity work, increasing the diversity of the board, and allocation of resources to racial equity efforts.

Senior Leadership

Philanthropy WV scored lower compared to other PSOs in the area of Senior Leadership. There may be opportunities for the organization to further the work of Senior Leadership in increasing racial/ethnic diversity within the PSO, setting goals about racial equity, understanding and responding to unconscious bias internally, understanding race-based power differentials, and engaging in difficult conversations related to racial equity.

Communications

Philanthropy WV's Communications score was lower than the average score of participating PSOs, indicating potential opportunities to incorporate a more strategic racial equity communications focus on future plans developed.

Assessment and Data

Philanthropy WV's use of Assessment and Data to guide racial equity work and efforts was marginally more developed compared to other participating PSOs. The next stage of development could focus on using the data gathered, collected, and analyzed to evaluate the impact of racial equity programming as well as the selection of vendors and partnerships.

Operations

Philanthropy WV's Operations around racial equity efforts were less developed compared to other participating PSOs. The organization may have an opportunity to continue intentionally focusing on and expanding recruitment and hiring of diverse candidates, as well as collecting and using data to determine hiring, retention, compensation, and promotion decisions. The collection and use of this data may improve the organization's recruitment and hiring of diverse candidates.

Reflection Questions

- What are the steps and supports needed to develop shared language to discuss and advance racial equity? What opportunities exist to identify and build on emerging pockets of shared language?
- How can the organization create safe spaces for ongoing dialogue about racial equity? What are the conditions necessary and already in place that facilitate and enable safe conversations? Who is the most suitable facilitator of these conversations: internal staff or external support? If internal, what criteria and skills are needed? Who determines what is a "safe" or "brave" space?
- What financial resources are being allocated to support internal racial equity efforts? What can be done to ensure these are more aligned with needs throughout the institution?
- How can staff leadership play a more active role in advancing racial equity efforts?
- What are a few clear and concrete goals/objectives staff leadership could establish to catalyze and guide more racial equity efforts across the organization?
- What tangible actions and steps will the organization commit to in the next year? What intermediate steps will the organization take to ensure progress is being made?

External Efforts

Organizational Learning Culture

Philanthropy WV had a slightly lower average score in this area, indicating that it is in the early stages of offering members targeted programming to inform Organizational Learning Culture on racial equity. There may be opportunities to expand programming for members related to developing shared definitions about racial equity work, facilitating difficult conversations, and building foundational understanding of racial equity.

Board of Directors

Philanthropy WV reported higher than average scores in how it supports members to advance racial equity efforts with their Boards of Directors. The organization offered members targeted trainings and workshops and brought in speakers and experts to support their members.

Senior Leadership

Philanthropy WV's external efforts to support members' Senior Leadership in advancing racial equity were marginally higher than other participating PSOs.

Community Engagement

Philanthropy WV scored lower than other PSOs in supporting members with Community Engagement efforts to advance racial equity. The organization may consider programming that helps members authentically engage community stakeholders, as well as understand the importance of gathering data on grantee boards, staff leadership, and staff composition.

Assessment and Data

Philanthropy WV's average organizational score was higher than other participating PSOs in supporting members with Assessment and Data. The organization may consider exploring additional ways to support members to use data to inform racial equity conversations, as well as establish policies and criteria to gather data on racial and ethnic composition of the organizations.

Operations

Philanthropy WV scored higher than other participating PSOs in supporting member organizations with Operations to advance racial equity, though the organization may consider developing additional programming to support PSOs to help their members develop recruiting and compensation efforts in ways that support these efforts.

Reflection Questions

- How aligned are the internal and external efforts across the organization? Why might a gap exist? What opportunities exist to better align the internal and external efforts?
- How can increasing internal capacity across the various internal domains support external programming offered to members?
- How aligned are members' needs about racial equity to the external programming offered to members? How is this communicated back to the organization and to the broader membership?