



SECF's Equity Framework *The Journey to Our Full Potential*

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Executive Summary

SECF seeks to inspire and strengthen learning, leadership and actions within Southern philanthropy dedicated to the advancement of equity in our field and region. This Equity Framework is a pivotal part of the journey to our full potential.

What is the Equity Framework?

It is a roadmap for SECF's commitment to advancing equity in the American South. The framework will strengthen and integrate into all that SECF does.

How does SECF define equity?

We define equity as the full inclusion of all people into a society in which everyone can participate and prosper.

How will we bridge the Equity Framework to our members?

Through three pillars:

- Connect (disseminating data and learning for measurable outcomes)
- Engage (providing programming and opportunities to connect equity to members' work)
- Inspire (modeling equity for our members)

Why is SECF creating an Equity Framework?

Because our members asked us to and because equity is integral to the future of philanthropy. The data, particularly that presented in 2017's *Philanthropy as the South's Passing Gear: Fulfilling the Promise*, provides a clear and unambiguous need to act. This framework will establish SECF as a leading philanthropy-serving organization in addressing inequity and will help our members on their journey to reduce inequity and tap into the full promise and potential of the region and all who live here.

What It Looks Like

Here are some of the ways that SECF will deepen its commitment to equity:

- Build a strong organizational culture that models diversity, equity and inclusion (DEI) for our members.
- Implement systems, policies and practices that prevent biases from operating.
- Create guiding principles around what we stand for.
- Expand learning journeys and peer leadership circles to exchange best practices and find common ground.
- Provide data, tools and resources to better serve our communities.

We invite you to explore the entirety of this framework and look forward to engaging with you in this transformative effort.

Equity Framework: The Journey to Our Full Potential

The Vision

Southern philanthropy leverages the full power of its voice to identify the roots of inequity, diminish structures that perpetuate it and build a region that achieves its full, equitable potential.

SECF seeks to inspire and strengthen learning, leadership, and actions within Southern philanthropy dedicated to the advancement of equity in our field and region.

A. What is an Equity Framework?

This framework provides a vision of SECF's commitment to advancing equity in the American South. The Equity Framework is not a separate body of work; it is something that can influence, strengthen, and integrate into all that SECF does. It is an act of service centered around our common humanity.

B. SECF's Definition of Equity

SECF defines equity as the full inclusion of all people into a society in which everyone can participate and prosper. In an equitable society, everyone, regardless of the circumstances of birth or upbringing, is treated justly and fairly by its institutions and systems. To promote equity in the South and elsewhere, philanthropy must first acknowledge the historical roots of inequity and the present-day systems that perpetuate it. It must then use its resources to spark transformation that allows all people to reach their full potential, unhindered by hatred, bigotry, exclusion or discrimination.

C. Pillars for Our Framework

SECF seeks to connect, engage and inspire its members. As such, we have organized the Equity Framework into three pillars:

- **Connect** - *Data and Learning*: SECF disseminates information that shifts the way we do philanthropy in the South. Its communication with others inspires actions that result in measurable outcomes.
- **Engage** - *Programming*: SECF bolsters work toward more equitable systems through opportunities to connect equity to members' work and relationships with peers. As a result, equity becomes a central value and practice of SECF members and our region.
- **Inspire** - *Vision and Values*: SECF models equity for its members by ensuring that our policies and practices, budget and culture reflect our values regarding equity.

D. Why SECF is Creating an Equity Framework

- **Our members asked us to.**
 - Our most recent Member Survey indicated that diversity, equity and inclusion were top areas of interest.
 - Sessions on diversity, equity and inclusion were some of our most well-attended at the 2018 Annual Meeting and received high ratings from participants.
 - Our members confirmed their interest when plans for the Equity Framework were announced at the 2018 SECF Annual Meeting.
- **The time is now.**
 - Increasingly, foundations in the South are recognizing that many issues today are the result of deeply rooted systemic disparities and inequities.
 - As SECF celebrates its 50th anniversary, its Equity Framework will help Southern philanthropic leaders understand how to contribute a voice and resources to reduce inequity and tap into the full promise and potential of the region and all who live here.
 - SECF stands with a number of leading philanthropy-serving organizations in creating an Equity Framework.

E. How SECF Is Creating the Equity Framework

- SECF's Board approved the creation of the Equity Framework in 2018.
- An Equity Framework Task Force was appointed to lead the effort.
- The Board and Task Force sought knowledge about equity and what peer organizations were doing.
- SECF asked for member input through focus groups, interviews and surveys.
- SECF will engage our membership around the Equity Framework and how it can advance their grantmaking.
- The Equity Framework will guide SECF's future data and learning, programming and internal policies and practices.
- We anticipate sharing the Equity Framework at our Annual Meeting in 2019.

F. Why Equity Is Important to SECF

SECF is acutely aware of the persistence of inequities in our region. Members have expressed interest in promoting equity and shown a willingness to acknowledge the historical roots and current manifestations of persistent disparities and the systems that maintain them. As philanthropic institutions, SECF and our members are well-positioned to address the areas where inequities are most apparent: economically, as well as in education, housing, health and other concerns.

Many of the most striking disparities are concentrated in the South, yet most philanthropic investments across the country do not touch Southern communities. The South is home to more than a third of the U.S. population, yet the region receives less foundation funding per capita than

any other region. Southern philanthropy therefore has a unique opportunity and responsibility to lead the effort to bring about greater equity in the region.

G. SECF's Diversity and Inclusion Statement

While this framework is specifically about equity, SECF also acknowledges and values diversity and inclusion. We know that the journey to our full potential means not only working toward equity, but also embracing the proven advantage that diversity offers.

As a membership association that intends to remain relevant long into the future, SECF values and seeks diverse and inclusive participation from its members. SECF recognizes the strategic importance of diversity and inclusion and promotes engagement and access to leadership opportunities regardless of race, gender, religion, age, sexual orientation, nationality, disability, appearance, geographic location or professional level. Through the unique and varied identities of our leaders and members, we grow and serve our communities at our best.

H. Where We Have Been: An Evolution of Advocacy and Equity at SECF

As we look toward the future of SECF, we can draw from the past to see the evolution that has brought us to this point. By examining our prior commitments to diversity, equity and inclusion (DEI), we can envision the next steps in our journey with greater clarity.

- **1969:** SECF was created to confront efforts of legislators to limit or halt the growth of philanthropic institutions.
- **1970s:** SECF helped our growing membership fulfill their legal responsibilities. We increasingly emphasized philanthropic values and priorities and debated our focus. At one conference we were asked, “Should foundations focus on charity or justice?”
- **1980s:** As we grew and began to include corporate foundations, advocacy became a topic of greater interest among philanthropy-supporting organizations and their members. SECF responded with an expanded agenda, conferences and well-known speakers who spoke on substantive issues such as education and community development.
- **1990s:** This decade brought many milestones for SECF including the election of the first female chair, Martha Peck, and the initiation of the Community Foundation Development Project. By the end of the 1990s, with new President & CEO Martin Lehfeldt at the helm and a growing, diverse staff, SECF was poised to diversify how it met the needs of its members.
- **2000s:** SECF focused on Hurricane Katrina and its aftermath and continued to help its members increase accountability, develop advocacy in public policy and strengthen communications. We adopted a set of Guiding Principles in 2005 and stated that we “value the diversity of experiences, ideas and opinions” and “promote and practice inclusiveness.”

- 2010s:** In 2011, Janine Lee was named president and CEO, bringing extensive experience leading philanthropic organizations and a track record of high performance to SECF. She was the organization's first female and first African-American CEO. In 2017, SECF partnered with MDC to publish *Philanthropy as the South's Passing Gear: Fulfilling the Promise*, showing where progress had been made in the South and offering a look at how foundations can do more to address adaptive challenges in the region. In 2018, SECF created the Equity Framework Task Force, which was charged with developing this Equity Framework.

I. Where We Are Going: What Equity in Action Looks Like for SECF

SECF has a history of helping Southern philanthropy enhance opportunities for children, families, and communities in the region; our sharper focus on equity is intentional. We are in the process of reexamining our principles and values and we will become a better philanthropy-serving organization by helping our members support equity. SECF will add new programs to help Southern foundations understand and apply their commitment to equity. The following diagram captures examples of these efforts. Some are well underway. Others are in development.



1) Looking Within: SECF's Organizational Commitments

As an organization, it is essential that we are structured to live our values and model them for others. We demonstrate our internal dedication to diversity, equity, and inclusion (DEI) in the following ways:

- **Organizational Culture** – DEI is a central part of what we value at SECF and we continually work to ensure that we are weaving these values into our fabric. SECF prides itself on building a strong organizational culture that best reflects our unique environment and represents the principles, trust, integrity, leadership and stewardship of our members. We seek diverse perspectives and people who share common values grounded in justness, fairness, civility and respect to create a culture of diversity and inclusion as a source of strength and enrichment within SECF and in interactions with our members and partners.
- **Systems** – While our commitment to DEI is strong, no organization or individual is immune to blind spots or bias. We commit to examining and implementing organizational systems, policies and practices that prevent biases from operating and that do not rely solely on our positive intent. We seek checks and balances from our members, as well as best practices from DEI experts.
- **Guiding Principles** – We solicit feedback from our members regarding our Guiding Principles as a membership association. We ask ourselves and our members the following questions: *What does SECF stand for? What are we willing to fight for toward improving lives and transforming communities in the South?* With member input, we will review our guiding principles, values and beliefs as an organization. We will present those Guiding Principles in early 2020.
- **Program Integration** – All our programs will embody the concepts and priorities of DEI. SECF continues to review its services, outreach and programs to explore best cross-cultural experiences and practices. To ensure program success across diverse populations of members, it seeks feedback from diverse stakeholders, studies performance evaluation and measurement tools that value inclusion and advance equity, and expands opportunities to be proactive.

2) Looking Ahead: SECF's Equity Programming

- **Chair's Book Club** – This book club allows members to learn more about the history of the South and review books written by Southern authors. It introduces titles that help people find common ground and build meaningful relationships and dialogue about diversity, equity and inclusion. The club will have a rotating selection of books and members who will serve as conversation facilitators.
- **Southern Learning Journeys** – Members and national funders will participate in journeys that help us understand how the Civil Rights Movement of the 1960s and the human rights movement today shaped educational and economic opportunities and outcomes for children and families in the South. We examine conditions and practices that

have the attention of Southeastern grant makers today, and we keep abreast of what calls for our attention in the future.

- **Resource Library** – Because SECF considers DEI a part of its core values, we cultivate opportunities for members to use research, data and trends to best serve underrepresented, underserved and marginalized communities across the South. We also provide tools for our members to assess their skills and competencies in the area of DEI.
- **Storytelling** – SECF members regularly provide shining examples of how to address issues of diversity, equity and inclusion. Through multiple platforms, including newsletters, blogs, magazines, podcasts, social media, webinars and Annual Meeting sessions, SECF will elevate the stories of this work so that all members can learn and benefit.
- **Philanthropy Bridging Divides** – Philanthropic leaders, including CEOs of foundations or coalitions of foundations, need a safe space to talk about the role of philanthropy during challenging times. This group would be limited to between 15 and 20 CEOs in the pilot year and serve as a forum for frank exchanges on what philanthropy stands for, what it is willing to fight for, and how we bridge divides to find common ground.
- **Peer Leadership Circles** – SECF will assist in the creation of peer network communities for constituency groups such as family foundations, private foundations and health legacy foundations, and/or groups that focus on issues such as DEI, economic mobility and the environment. SECF will provide each peer network with at least one webinar and two or three round-robin calls a year.

J. Moving Toward Equitable Southern Communities

As Southern philanthropy strives to create stronger communities with greater opportunities for children and families, much needs to be done in the area of equity. Many members have made equity the centerpiece of their philanthropic strategy, while others are at earlier stages in understanding the connection between equity and their priorities. All SECF members want to have a greater impact in their areas of interest. Seeing philanthropic work through the lens of equity does more than improve communities; it also improves the foundations that use that vision. Philanthropic foundations of all types will benefit while they contribute to greater equity in the South.

This Equity Framework is one more step in an evolutionary process for SECF. By listening to members about what equity means to them, SECF has long been developing programming to help members improve their effectiveness – for example, by applying Passing Gear concepts to broaden our impact. Now we are at our 50th Anniversary. We recognize where we have been and where we can go. We want to reduce inequities in the South dramatically and bring greater attention to the region. This framework is an important pivot point and a beacon for the future.

We invite SECF's membership to help us guide the future of the Equity Framework and shape how the Equity Framework can best support their organizations.