

LEARNING IN ACTION



盧勝彥佈施基金會
SHENG-YEN LU FOUNDATION

Sheng-Yen Lu Foundation (SYLF) is a regional grantmaker that serves low-income immigrant and refugee communities in the Puget Sound region.

Historically focused on advancing and promoting quality health and education for immigrants and refugees in the Puget Sound region, the SYL Foundation expanded our justice framework in 2017 to include social, economic, racial, and immigrant justice over the last five years. Over the same time period, SYL Foundation changed grantmaking practices and internal practices to align with the expanded justice framework.

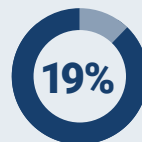
Context for Our Racial Equity Approach

We have endeavored to advance and promote quality health and education for immigrants and refugees in Washington's King, Pierce, and Snohomish counties since our founding in 2008. Puget Sound is home to approximately 4 million people, of which the largest share is White, although the area also has a sizable and diverse immigrant and refugee community. As of 2020, over 19% of Seattle's population is immigrants,¹ with the largest groups representing from Asia, Latin America, and Africa. People of color in Seattle, including immigrants and refugees, experience significant income and wealth gaps, which are connected to and reflected in disparate unemployment rates, shares of cost-burdened renters, business values, educational attainment levels, healthcare coverage, and homeownership rates.²

Rooted in immigrant justice since our inception, we began work to broaden and deepen our justice framework in 2017, with the goal to include social, economic, racial, and immigrant justice as organizational learning and understanding evolved

around the influences and impact of intersecting systems on people's health and financial well-being. The expansion of our justice framework was largely sparked by current events, which heightened the sense of urgency around addressing disparities. The shift in the framework has been accompanied by grantmaking changes, resulting in more community-driven strategies and systems change efforts to address structural inequities.

Puget Sound is home to approximately **4 MILLION PEOPLE**



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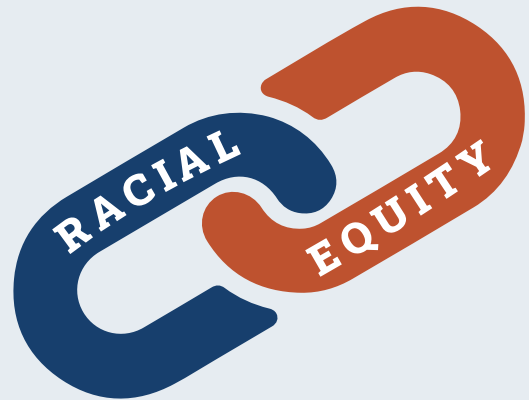
The link between health and wealth is inextricable and bidirectional. Both health and wealth are rooted in community conditions that include access to quality housing, jobs, healthcare, childcare, education, and public amenities. Due to longstanding structural racism and disparities resulting from policies such as redlining and practices such as disinvestment, conditions across communities are not equitable. Focused investments that improve health outcomes and promote equitable wealth building are mutually supportive and ensure that immigrants and refugees are healthy and thriving.

Investment Strategies Linked to Our Racial Equity Approach

Our racial equity approach has evolved over the past several years to include a public commitment to racial equity that acknowledges inequities due to systemic racism and pledges to address structural injustices. Under a broad justice framework, we fund community-led programs and strategies driven by leaders who are immigrants and people of color to address immediate needs, the root causes of disparities, and policymaking that advances equity. Our current approach:

- Builds on our founding mission to support access to healthcare and education for immigrants and refugees by focusing on justice more broadly. We continue to support healthcare and education access directly but also fund related activities, such as deportation and legal defense, medical-legal partnerships, and entrepreneurship.
- Is both broader than and linked to economic justice. Though our direct funding of economic justice efforts has been limited thus far, we recognize that economic justice is integral to immigrant and racial justice and that access to healthcare and education are economic justice issues. We have started to fund economic justice work more explicitly as part of funding more upstream interventions, such as working with World Relief, a refugee resettlement agency, to support an entrepreneurship program using a commercial kitchen in Seattle to increase economic security and improve access to healthcare and education.
- Is built on an understanding of the interrelationship between crises and societal structures and acknowledgment that both must be addressed to support immigrant and racial justice, bolster the well-being of immigrants and other marginalized people, and be responsive to their needs. Historically, we have funded small, grassroots organizations that deliver services to meet immediate needs. For long-term change, the foundation is expanding its base of

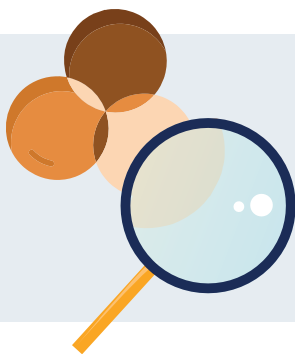
INVESTMENT STRATEGIES



grantees to include organizations of all sizes that engage in advocacy and power building to help change societal structures. We continue to fund services and is now working to develop strategies to find and fund more small organizations that have not had access to philanthropic funding.

- Supports solutions to systemic inequities that are rooted in the affected communities by investing in leaders who are immigrants and people of color, funding community-based systems change efforts, and practicing trust-based philanthropy.

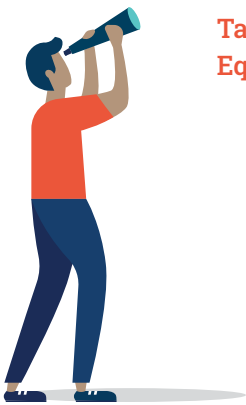
In response to community feedback, and acknowledging the interrelationship between immigrant, economic, racial, and social justice, we are developing a new justice fund to bring together several funding streams that developed out of recent crises to create a coherent funding strategy. Through that fund, which will launch in 2023, we plan to focus more specifically on economic justice activities, while maintaining our existing Health and Education funding stream.



By focusing on justice, SYL Foundation incorporates various strategies to make its grantmaking process more accessible, equitable, and responsive to the community.

Internal Practices and External Grantmaking Strategies that Focus on Equity and Reduce Bias

Over the past five years, we have made iterative changes to our internal practices and external grantmaking strategies through sustained effort and conversations with staff, the board, and the community. Those adjustments included crafting methods for measuring outcomes, integrating tools in the grantmaking process to foreground racial equity, centering community voice, and developing a shared language.



Tactics for taking a Racial Equity Approach:

- Craft ways for measuring outcomes
- Change funding practices
- Center community voice
- Develop a shared language

CRAFTING METHODS FOR MEASURING OUTCOMES.

We have shifted our reporting processes from a focus on outcomes measurement in the community to examining measures of internal growth, learning, and accountability. This shift was informed by trust-based philanthropy and a recognition that the foundation should measure our own practices and outcomes at least as stringently as we demanded that grantees do. Gradually over several years, we have moved from asking grantees for specific outcomes reports to documenting self-determined goals and progress against minimal measures. The measures selected are designed to track our priorities, including diversity and inclusivity across the communities served and types of organizations funded. As of this year, grantees report on leadership of color, ethnicity of immigrants served, locations and communities served, budget size, rough number of immigrants and refugees served, and activities or services provided. They also reflect on where they are now, where they want to be in the future, what challenges they face, and how SYLF can be more supportive.

Grant reports are intended to be easy and to offer an opportunity for the grantee to tell an authentic story about its work and goals. Written reports can be created anew or repurposed from another funder's report; oral reports may

be delivered in a face-to-face conversation or by uploading a video. As part of our language justice work, narratives can be submitted in languages other than English.

Shifting measurement methods took time, effort, and incremental change. While the appetite for leaning into trust-based philanthropy was there, the board had to grapple with its responsibility to use and track funds responsibly. Staff had to reframe its diligence work on the front end, when getting to know organizations and talking to the community. To operationalize trust-based philanthropy, staff leadership discussed values and conducted research and then introduced the concept and readings to the board. Through this process, the board came to understand that the approach would support both impact and responsibility.

INTEGRATING TOOLS AND PRACTICES IN OUR FUNDING PROCESS.

Using a justice lens, we have incorporated various strategies to make our grantmaking process more accessible, equitable, and responsive to the community, including:

- *Simplifying the application process and making it more accessible.* Our grant application is short and mirrors the reporting process, to support an easy and seamless experience. As with reports, grant application narratives can be provided in a language other than English. To make itself more accessible, especially to smaller organizations that have limited English proficiency or access to grant writers, we regularly engage in conversation with the community. This year, the foundation is running a pilot that asks long-term grantees to nominate rising community organizations for small grants that do not require an application. This pilot also supports one of our overarching goals to shift more power to the community.
- *Prioritizing organizations led by immigrants, refugees, and people of color in the majority of funding.* We now ask in our grant applications if the executive director, board leadership, and senior staff leadership are immigrants or people of color. Last year, over 70% of grantees had leaders who are immigrants or people of color. In addition to operating support, we also invest in community leadership and capacity building for organizations led by people of color and immigrants. For the first time this year, we offer a separate grant for sabbaticals through a program run by the BIPOC Executive Director Coalition for leaders of color who are immigrants themselves or are working for immigrant-serving organizations in Washington State. For all staff, we have sponsored training opportunities for grantee

organizations over the past few years, such as a session on secondary trauma training through the Trauma Steward Institute and an upcoming one on power building and advocacy through [Bolder Advocacy](#).

- *Applying the [Equitable Grantmaking Continuum](#) developed by the Rainier Valley Corps as a tool to measure grantmaking practices and support of community-based organizations using a racial equity framework.* The tool includes trust-based philanthropy practices, such as providing multiyear, general operating support grants; supporting leaders of color; investing outside of grants; and engaging in other activities that are responsive to community needs and facilitate the work led by people of color. We review progress and set goals using the Continuum at our annual retreat. The tool has been helpful in identifying and eliminating biased and oppressive elements of our funding process. Since using the tool, we have adopted the practice of making more multiyear operating grants and providing flexible support that falls outside of regular grantmaking cycles.

CENTERING COMMUNITY VOICE. Leaning into the belief that the community best knows what solutions will work for it, we have in each of the past three years surveyed grantees, asking about the biggest unmet needs in the community. The surveys have revealed a need for advocacy support and COVID relief, to which we have responded through funding.

DEVELOPING A SHARED LANGUAGE BETWEEN STAFF AND THE BOARD. Getting staff and board in alignment with the new framing and approach took time, effort, and ongoing conversations. Together, staff and the board built a culture of trusting grantees and applying a justice approach within and outside of the foundation.

We try not to be too demanding of the board. Every year, board members attend a long retreat day; board learning happens primarily on the retreat day, and follow-up conversations happen at each of the board meetings throughout the year. In 2018, staff started using those retreat days to talk about systemic racism and how to confront it through grantmaking practices, such as through general operating support and by funding systems change work. As an early consensus developed that the community was the expert on solutions, we started to fund more community-driven activities. Then we included more general operating support and larger grants in our funding plans. Because the strategy was so different from past approaches, funding larger advocacy organizations took more time, and both staff and board had to come to terms

with a “both-and” strategy of funding both smaller service organizations and larger advocacy organizations.

As the board and staff talked about shifting grantmaking approaches, and we moved to a broader justice frame for its grantmaking, many conversations about intersectionality arose. The board and staff discussed interconnected systemic inequities, White supremacy and its impact on everyone, the need for cross-sector collaboration, and the importance of advocacy and systems change work.

Staff provided ample data, resources, and education to the board and engaged in dialogue. Outside experts proved to be helpful with board buy-in, especially around funding advocacy work. Staff brought to retreats people from the Nonprofit Assistance Center, Philanthropy Northwest, and other organizations, as well as legal experts. Board members were also encouraged to engage with online trainings and readings. We also brought community leaders to the retreats to share their knowledge; these leaders were compensated for their time.

Impact of Our Racial Equity Approach

Our hope is that its racial equity approach makes it easier for community-based organizations to reach their goals by facilitating their work in the community and reducing their funding burdens. With more freedom and ease, organizations can focus on dismantling systems of oppression and making the world more equitable.

Reducing the time it takes to complete an application from twenty hours to one might seem small, but it is an element over which we have control. Other changes to support rather than drain community power include making grant applications and reporting easier, allowing grantees to tell authentic stories, responding to the needs grantees highlight instead of deciding what organizations should be doing, and supporting leaders so they are not burning out on the job. In the end, we see these changes as returning resources to the community in ways that are supportive as opposed to onerous.

Feedback from grantees on the racial equity approach journey has been positive. One grantee shared that it is so helpful having a partner that just wants to hear about their goals and how they are working on them instead of really specific measurement.

Key Lessons for Other Funders

Lessons from our experience include:

- 1 Be in dialogue with the community.** What are both informal and structured ways you can hear from the community? Think about mechanisms you can use to learn about and consider community needs. What is possible in your reporting structures—can you ask about achievements or needs? Where else could you create a space for the community to tell you what they need? Beyond gathering authentic information, set aside time to reflect on the findings. Build in time for reflective conversations.
- 2 Allocate time, structures, and energy for reflection and talking through changes between staff and board.** If possible, have meetings or retreats where the board is not doing grantmaking business, so board members have time to learn, think, and reflect on what is surfacing from the community or broader industry. Bring in outside experts when the board is grappling with a difficult or challenging concept. Include community members as experts and compensate them for their time and knowledge.
- 3 Use your own voice whenever possible.** In addition to grantmaking, lend your power and voice to community initiatives without decentering community voices. Grantmakers can help raise the profile of work being done in the community in a variety of ways, including signing on to community letters on policy issues and providing opportunities for grantees to speak to other foundations at conferences or roundtables.



RACHEL ALLEN

Vice President, Director of Programs and Operations

I hope what we are doing is freeing up community power to dismantle systems of oppression and achieve a more equitable world.

Endnotes

1 United States Census Bureau, Quick Facts, <https://www.census.gov/quickfacts/seattlecitywashington>.

2 Ebony White and Lillian Singh, The Racial Divide in Seattle Washington, *Prosperity Now*, March 2021.