



UNITED PHILANTHROPY
FORUM

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**LEADING WITH
INTERNAL EQUITY:
The Case Story
of Hispanics in
Philanthropy**

**Prepared by Community
Centered Evaluation and
Research**

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Acknowledgements

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Community Centered Evaluation and Research (CCER) was founded in 2018 out of a desire to center racial and economic equity in research and evaluation. Community CER is a values-driven, woman-of-color-owned social change research and evaluation consulting firm dedicated to supporting social sector organizations to achieve their greatest impact.

ABOUT THE CASE STORIES AND THEIR CONTRIBUTORS

Advancing racial equity, diversity, and inclusion (REDI) in philanthropy is a key strategic priority for the United Philanthropy Forum (Forum). Over the last few years, Forum has embedded racial equity intentionally and explicitly, both internally with the organization and externally through programming and resources to PSO members. Among the resources provided to member PSOs is the Forum's Racial Equity Organizational Self-Assessment, originally launched in 2019. The findings from the 2019 assessment helped Forum better understand how to support members along their racial equity journey, as well as provided great insights for members about their own racial equity journey and that of the sector.

To complement the learnings from the Racial Equity Organizational Self-Assessment, the Forum commissioned Community Centered Evaluation and Research (CCER) to uplift and share PSO member's racial equity learning journeys through the development of in-depth case stories. The case stories capture the wide experiences of PSOs across varying geographic regions and organizational size and breadth of focus. Four Forum PSO member organizations shared and reflected on their internal and external racial equity journey through one-on-one, in-depth interviews conducted with various staff members. The PSO member organizations that participated in the case stories are listed below, along with the key staff that contributed their time and perspectives.

ABOUT THE FORUM

As the largest and most diverse network in American philanthropy, United Philanthropy Forum holds a unique position in the social sector to help increase philanthropy's impact in communities across the country. We are a membership network of nearly 100 regional and national philanthropy-serving organizations (PSOs), representing more than 7,000 funders, who work to make philanthropy better. The Forum envisions a courageous philanthropic sector that catalyzes a just and equitable society where all can participate and prosper.

The Forum has created a new kind of philanthropic network that brings together regional PSOs' deep regional roots and connections with national PSOs' deep content knowledge and reach. Given our network's scale and scope, we can lead change and increase impact in philanthropy in a deeper and broader way than any other organization in our field.

To learn more about Forum membership, please visit: www.unitedphilforum.org/join.

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About This Case Story

The story of Hispanics in Philanthropy’s racial equity journey offers an example of prioritizing deep work within the organization. By strengthening equity internally, HIP seeks to live its values and build an organizational culture and practices that support and reflect its external equity work.

In the early 1980s, change makers in California’s Bay Area saw a long history of substantial philanthropic underinvestment in Latinx communities worldwide and decided to do something about it. In 1983, three Latinx founders launched Hispanics in Philanthropy (HIP) with the goal of bringing more philanthropic attention to Latinx communities and the social and economic issues that affect them.

Today, HIP combines fundraising, grantmaking, advocacy, and investment in startups to support Latinx-focused nonprofits and social impact projects across 18 countries in the US, Latin America, and the Caribbean. Its offices in the US and Latin America have mobilized a large network of partners, raising awareness among funders and drawing dollars and resources from philanthropy and the public sector toward Latinx communities. HIP prioritizes a range of issues such as Latinx leadership in philanthropy and nonprofits, racial and gender equity, migration and forced displacement, power building and justice, and wealth creation opportunities.¹

In recent years, HIP has taken a closer look at its role in advancing racial equity, both within the organization and through its external programming. This case story highlights the voices of several HIP staff who participated in interviews to explore the organization’s journey to strengthen its approach to racial equity.

¹ For more information on Hispanics in Philanthropy, visit hipfunds.org.

JOURNEY TOWARD RACIAL EQUITY

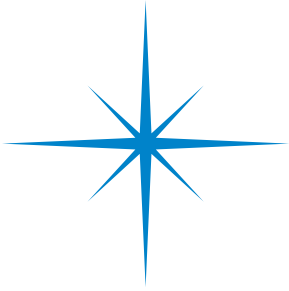
An opportunity for racial equity leadership. As an organization, HIP is focused on addressing inequities experienced by Latinx communities; its commitment to racial equity is embedded in its work. As a staff member described it, “A lot of the systemic issues that we fight day-in and day-out have to do with racial injustices and racial equity.”² Explicit attention to racial equity issues within the organization, however, has historically been less pronounced, at least at the leadership level. The same staff member went on, “It has evolved more bottom-up, meaning the staff is really aware, understands, and accountable to racial equity in the programs. It possibly took a little bit longer [for racial equity] to get into the board and leadership.”

Contextual upheaval. A confluence of large-scale occurrences in recent years—the Trump administration, broad public awareness of racial violence by police, and COVID-19—prompted many Americans to contend with racial equity issues in ways they never had. The shifting social context was a motivating factor for HIP as well. The rise of Donald Trump’s political power brought with it widespread heightened emotions and rhetoric with regard to race. “As we were heading into the Trump administration, it was a really difficult time for all communities of color,” remarked a HIP staff member. Public attention to racial inequities continued to grow across the US with increasing publicity of police violence against Black people, most influentially with the murder of George Floyd in May 2020. Concurrently, the COVID-19 pandemic began, and with it, the reality that people and communities of color in the US—as well as poorer nations worldwide—were bearing the greatest health and economic consequences. A staff member related how the pandemic directly affected the outlook of those at HIP:

“We went into the pandemic and it was really difficult to see the systems break apart in real life and to see power and privilege come to life. It was really difficult for us [to see] the US get the first sets of vaccines and in Mexico we had one colleague that lost her mom and dad back-to-back because there were no vaccines available. Things felt very visceral and personal.”

New organizational leadership, fresh focus on values. Amid this context, HIP underwent a leadership transition to a new president and CEO, Ana Marie Argilagos, a change that was pivotal in facilitating the organization’s internal deep dive into racial equity. “Our leader,” described a staff member, “was someone who... wanted to be really intentional [in being an equity-focused organization].” Another agreed, “Ana Marie has really driven the work from the racial equity point of view since day one.” Not only was the new focus on racial equity aimed at HIP’s external programming, but on investing in internal reflection and change. As a staff member put it, “[The new president’s] leadership allowed us to pause and hold space for our staff to come in and define equity and to really define our North Star that was going to guide how we move forward as an organization.” Another remarked that prior to the leadership change, HIP “was a bit more white-dominant [in] values and principles and programming and mission. Ana Marie’s leadership has really pivoted the organization and the reputation in the field around this work.”

² Quotes throughout have been edited lightly for clarity and brevity.



“Having a really strong North Star around our equity work both internally and externally has guided the ways in which we can move forward or make space for the conversations that have to happen.”

-HIP staff

Bringing in funding and people. Around this time, HIP received a large unrestricted donation that enabled ample budgeting to shift staff time towards equity-focused learning and hire consultants. “HIP was super ready to step into racial equity work, and increased funding helped put it into action,” noted a staff member. With the help of consultants, the organization embarked on examining and reimagining its practices and culture. In addition, Ana Marie hired a director to lead HIP’s racial equity work from within HIP. “Getting an external consultant to facilitate the conversations was a game changer,” a staff member shared, continuing:

“They were able to create an environment where folks were able to learn with a Latin-centered curriculum. Whatever we committed to, they followed up with us. If we didn’t do it there was no shame on their part; their response came from a frame of exploration. The consultants also did a lot of work with the board and made it a point to do a lot of focus groups without directors and managers to make sure that folks were able to share their feedback.”

“It does feel like a luxury to be able to pause your work as an organization and do these multi-hour webinars and workshops around equity. But it also doesn’t. I mean, the investment has to start somewhere... I don’t think it’s all about money. It is a lot about intention, vulnerability, and relationships.”

-HIP staff

INTERNAL APPROACH

As HIP set to focus on equity more intentionally, internal work was the first priority. As a staff member explained it, HIP began by looking at “what needed to shift internally so that we could better serve community externally.” Some of HIP’s key efforts included:

Fostering a racial equity focus among all staff. HIP began by “educating our staff and not assuming that everyone was at the same level of understanding,” a staff member explained. The organization invested in holding staff workshops in English and Spanish that facilitated, as another staff member put it, “confronting our own anti-Blackness and anti-indigeneity as well as power and privilege and colonization.” Even though HIP’s external work was closely tied to equity issues, internal reflection on equity was new to many. A staff member remarked, “Before HIP, I had not had training on racial equity...These workshops and material are about discrimination and the unconscious bias we have... The conversations helped us surface the bias and how to eliminate it. It has been a journey.” Another added, “The curriculum that we did, specifically around power and privilege was really helpful to people. Folks hadn’t stopped to think what their relationship was to privilege within our staff that might cloud how we engage with people [and] organizations.” In addition, HIP began to ensure that its hiring would support its focus on equity. “As our organization has grown,” a staff member explained, “[there] has been a commitment to bring on folks that understand racial equity and why it’s important within the Latinx community.”

Exploring racial equity across borders. As a transnational organization, HIP needed to account for the fact that race factors differently into each nation’s history, culture, and social narratives. As one staff member explained, “Mexico is not the same reality as in the US. We don’t live the same discrimination. ...[Because] the narrative was from the US, there were times where [the Mexico team] had to pause to figure out how it translated to the realities of Mexico.” At the same time, another staff member pointed out that HIP’s staff based in Latin America were strongly in favor of addressing racial equity. A third staff member described HIP’s strategy to acknowledge and learn about cross-cultural and geographic perspectives on equity, saying, “[We have been] having our Mexico office help lead and drive some of these racial equity conversations, helping educate us in the US as to how racism shows up in Latin America, in Central and South America, versus the US and how do we talk about it.”

Board alignment with equity priorities. In addition to staff, board members received similar training on power, privilege, and equity. They were also involved in developing HIP’s guiding framework for its equity work. A staff member shared that the board “helped review and draft the North Star in terms of what equity meant to us as an organization.” The work helped to align the board with the organization’s new focus. When staff raised the possibility of revising language on the HIP website to reflect a more equity-centered approach, one staff member recalled, “I was nervous about the [reaction of the] board [but then] recognized that they were right there where we were at: [they] respected the legacy of HIP but wanted to drive our racial equity work.” Indeed, the board now has a racial equity committee.

Centering staff needs. For working people everywhere, the COVID pandemic exacerbated the challenge of juggling job responsibilities with sick leave and caretaking of family members. For many HIP staff members, caretaking responsibilities carried cultural importance as well. These circumstances led to a call for HIP to be more flexible and equitable about work time. A staff member commented, “Those folks that have kids [or] are watching after elderly parents—these things are very ingrained in Latinx community. How do we provide space for that?” With staff attributing bold new policies to Ana Marie’s willingness to take “a lot of risks” and be “courageous,” HIP established among other changes: unlimited sick leave and caretaker leave during Covid, two additional paid weeks off, and Fridays free of meetings to allow staff to get their work done. “We’re trying to create these moments of pause and space for our staff,” explained a staff member.

“[HIP President Ana Marie] really is trying to hear us out and test some of our requests.”

-HIP staff

The organization’s hard work to improve internal racial equity is making a difference. “When I first started,” commented a staff member, “there was resistance to decentralized decision making, with people thinking they were losing some power. [Now,] not everything has to go through the president. People make decisions on their work, creating much more robust leadership.” Another staff member added, “Before, I don’t know if I would have taken a position at Hispanics in Philanthropy because racial equity is a big value of mine and I want to be in an institution that reflects those values. We doubled [our staff] in the last year—people want to work at HIP and are excited that Ana Marie is taking this on very seriously with the board. We have new board members coming in that really reflect the importance of discussing and centering racial equity. We see those changes internally.”

HOW HIP PREPARED FOR THE CHALLENGING WORK OF INTERNAL CHANGE

Working toward internal equity involves questioning existing practices and culture. To enable staff to raise concerns, leadership must be ready for uncomfortable conversations and collaborative, rather than top-down, solutions. HIP's journey offers an instructive example of initiating open, constructive dialog. A staff member involved in facilitating organization-wide readiness for internal learning sessions summarized HIP's preparations and early results:

Preparing leadership: HIP's leadership team did "a lot of Brené Brown readings [on] courageous conversations... with vulnerability and letting go of ego. I prepped leadership to say, 'We're going to hear some difficult things and it doesn't mean that we have failed. This is an opportunity for us to grow and understand our blind spots. We will engage in a courageous and uncomfortable conversation so that we can surface what we need to hear, for us to be better collectively.'" Adrienne Maree Brown's *Emergent Strategy: Shaping Change, Changing Worlds* to support their transformation.

Preparing other staff: Staff were invited to raise concerns but were asked to "not call the individuals out. Name the issue and the problem without pointing a specific finger to someone so that we could all have shared responsibility as leadership as to what was coming up."

How the sessions went: "It was nerve wracking," the staff member acknowledged. Yet the challenging sessions proved that "we can have difficult and uncomfortable conversations and still be fine. That really changed the way that leadership engages with our staff." Furthermore, as a result, "staff had full transparency behind why certain systems and structures were put in place and what can shift...It opened up these lines of us being able to work authentically and call things out more immediately."

EXTERNAL PROGRAMMING

As HIP's internal work has progressed, the organization has also begun taking wide-ranging steps to strengthen its external focus on racial equity. "In this last year," a staff member shared, "we finally felt comfortable enough to shift our work to an external component." To date, HIP's efforts on this front have included:

Racial equity-focused grantmaking. HIP's programs are increasingly explicit about working toward racial equity. Overall, noted a staff member, "We try to elevate the voices of different communities that are not typically centered or are historically excluded. Part of our vision is to identify some of the root causes of these inequities—not just from a US perspective but from multiple countries." In its capacity as a regranteeing organization, for example, HIP recently launched a power-building fund, Power Building and Justice (PB&J), that a staff member described as "a multi-year grant to support organizations that are building multiracial movement strategies in the South" and another mentioned grants to support nonprofits in working on narrative change. In addition, the organization's migration team is exploring the intersection of climate change and racism.

"[HIP is] looking outwardly on how to support our ecosystem, whether that means with trainings or finding the right partners to elevate these conversations within the world of Latinos."

-HIP staff

Racial equity-focused advisor. HIP has what a staff member described as a "new area of work advising foundations to center racial equity and how to be better funders to BIPOC communities." Similarly, HIP facilitates learning with other organizations, sometimes enabling uncomfortable but important conversations. One staff member noted that these efforts sometimes meet resistance because of a perception that people of color cannot themselves perpetuate racism:

"Sometimes folks in our community don't believe we can be racist because we are people of color. So, there's an extra layer of looking beyond white and black. It's also colorism. It's also the things that we learn through our families about our hair texture and our skin color and about where we're born, like Dominican Republic versus Mexico. There are a lot of complexities that [require] an additional step to educate our communities, our educator leadership, and even our grantee partners."

Inclusive communications. Following a practice that started during the internal equity work, HIP began better accommodating the language diversity of its staff and communities. As a staff member described it, "Everything is written in English and Spanish within HIP. All of our conferences and webinars have interpretation, and we have a budget for that in every program. I think that's super important." Another staff member added that HIP "in all our external webinars [began providing] live transcription and live translation to ensure that we were supporting communities with disabilities and multilingual communities."

Equity-infused practices. Thanks to HIP’s internal equity work, racial equity is now an integral part of how staff approaches their external-facing practices. “It’s become the focus of everything we do,” a staff member said. “In [our 2022] conference, all of the sessions have to have a racial equity lens. It’s become just a way of doing things.” Moreover, although HIP does not have a process to assess organization-wide progress on advancing equity, according to staff, racial equity is key to tracking programmatic progress. A staff member commented, “[We] look at race as a real indicator of the health of our programs, bringing it down to a local level, to each of the programs and staff to show that we all are committed to this work.”

Acknowledging tension. A HIP staff member verbalized a challenge in addressing racial equity in Latino communities. As the ‘racial awakening’ became more mainstream, much of the response in philanthropy focused on addressing anti-Blackness and shifting systems to improve equity for Black communities. Some people committed to Latinx causes worried that the social climate could negatively affect their own ability to raise funds if funders prioritized Black racial equity. The staff member articulated, “Part of our journey is that there is some discomfort in the last few years with the racial reckoning—a scarcity mentality. If others are getting funding [to address anti-Blackness], what about the Latino community?” While this kind of thinking can have the unfortunate effect of pitting underserved groups against one another, it also points to a fundamental shortcoming of philanthropic funds being competitive and awarded to some worthy causes while leaving others without needed support. At the same time, a staff member reported that HIP’s members and partners have generally embraced the idea of centering racial equity.

HIP’s external racial equity work is an ongoing learning process that broadens staff understanding and informs new adaptations. As a staff member put it, “I am constantly learning and understanding what the journey looks like for different folks [and] how to be an ally and a partner. External work helps us keep updating our language and how to use it internally and externally.”

QUESTIONS TO SPARK REFLECTION

Multiple HIP staff members offered questions that they find helpful to ask themselves and others as they seek equity:

How are we communicating to show that we are inclusive not just of Black or Afro-Latino identities, but transcending the gender spectrum, neurodiversity and disabilities?

Whose voices are we leaving out? How can we include them?

How are we explaining how race shows up in this conversation?

How do we take accountability for our own blind spots?

What are we doing to liberate communities?

LESSONS FOR PSOS AND PHILANTHROPY ON ADDRESSING RACIAL EQUITY

The journey that Hispanics in Philanthropy has undertaken to center racial equity in their internal and external work offers lessons for philanthropy-serving organizations (PSOs) and philanthropic funders. The following recommendations are based on ideas and insights from HIP staff.

Be brave and persistent. Starting racial equity work—even in a small way—is the only way to make progress toward integrating that value into an organization. Once begun, the work is an ongoing, evolving journey rather than a box to check off. But as a HIP staff member points out, “You don’t have to go a hundred miles an hour; just keep the work going forward.”

“PSOs fear that if they work on racial equity or talk to their members about racial equity, they’re going to lose people or lose funding. We see the opposite. We see that membership grows, funding grows. We see more collaboration.”

-HIP staff

Start internally. HIP’s approach of prioritizing internal equity work before tackling external change allows organizations to demonstrate a meaningful commitment to their staff and work culture, building a strong foundation for external values-based work. In the words of one HIP staff member, “I would urge PSO organizations to focus on the internal workforce because that will be the first thing that will be called out when your external values don’t match what’s happening internally. We’ve seen that over and over. Internal work was so important [for us] because it needed to match the vision that we’re trying to create externally in our communities.”

Leadership, be ready and comfortable ceding power. Multiple HIP staff emphasized that efforts to advance racial equity must be clearly backed by leadership. When the president or CEO, executive team, and, ideally the board provide an explicit commitment to doing this work, it enables other staff to be both vulnerable and accountable. In terms of the day-to-day mechanics of moving racial equity work forward, a dedicated director or team is essential for keeping efforts front and center. However, because all staff contribute to the organization’s culture, all must be involved as much as possible in equity trainings, reflections, and actions. As a staff member put it, “To really shift culture, [you need] buy-in from everybody, and to get buy-in you need shared understanding.”

“The president or executive director is the one that has to say this is a priority, not because it’s the popular thing to do but because it’s the right thing to do... That vulnerability and permission setting has to happen.”

-HIP staff

Meet people where they are. HIP staff point out that each person is at a different place in their own equity journey; the goal is to support all in moving forward. Doing so means approaching the topic from multiple angles and at different times, not assuming one training session will reach everyone. Furthermore, because racial equity work involves uncomfortable conversations, it is important to provide a caring environment that attends to staff wellness. One staff member advised, “Create reflection sessions where staff can express freely and ask questions. Every person lives these topics differently. Respect how people feel because these are difficult topics. Be patient. Ask staff: ‘How do you feel and what do you need?’” Another added, “Offer a lot of grace and time and build in space for healing—not just for the person receiving the racism but the person being racist—there has to be space for them to sit with the inquiry.”

“There’s a way to talk about race without [some people] wanting to step out the door or evade the conversation. This is a part of racial equity work: knowing who is in your organization, where they are, and what language works.”

-HIP staff

Tap into external resources. A successful strategy of HIP's was drawing on existing literature and frameworks, as well as help from consultants to guide their equity work. Staff cited Equity in the Center's *Awake to Woke to Work* model and other free resources as particularly helpful,³ as well as the Latinx Racial Equity Project's facilitation resources around equity and leadership.⁴ They also noted the value of hiring consultants and facilitators for workshops exploring power and privilege. In addition, HIP itself provides an example for others of, as one staff member put it, "how flexible we are with failing. We try, reflect, and shift [with] no punitive action if something does not work out. I feel optimistic about how HIP is developing racial equity work because of the culture of being okay to fail."

"We love the Awake to Woke to Work model from Equity in the Center. They have the entire blueprint for organizations."

-HIP staff member

Show accountability. While advancing racial equity is a long-term, evolving process, tracking change over time and learning from inevitable bumps in the road can keep organizations on a constructive path. A HIP staff member points out that "accountability doesn't mean you have to take a quantitative data approach that burdens staff, but [can mean] dedicating time to showcase your successes and lessons learned, [for example, in] an external document showing your stakeholders what you have accomplished and roadblocks" that are informing your next steps.

3 equityinthecenter.org

4 latinxracialequityproject.org

THE JOURNEY CONTINUES

Hispanics in Philanthropy’s racial equity efforts are ongoing and expanding in new directions. Staff identified the following areas of ongoing work and offered their ideas for further needs to address both internally and externally.

LOOKING AHEAD: FURTHER INTERNAL AND EXTERNAL RACIAL EQUITY EFFORTS AT HIP	
Ongoing Internal Work	Ongoing External Work
<ul style="list-style-type: none"> • Continue to use the learning process to adapt vision and goals around racial equity. • Continue to evolve power distribution in HIP. • Expand internal work to include gender equity, disabilities, and neurodiversity more intentionally. • Continue to explore different learning models and perspectives across transnational teams. • Focus on equity across US- and Mexico-based staff. 	<ul style="list-style-type: none"> • Continue implementing racial equity-focused programming. • Continue program-based goal setting and learning processes.
Additional internal needs	Additional external needs
<ul style="list-style-type: none"> • Revisit internal training and offer ongoing facilitated reflection sessions to maintain involvement across staff and identify areas for improvement. • Better systematize the racial equity work and integrate it into procedures so it relies less on individuals’ leadership. • Identify funding sources to maintain the internal work. 	<ul style="list-style-type: none"> • Create better systems to track progress organization-wide, not just in individual programs.