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IDEA GRANT INITIATIVE

LEARNINGS & OUTCOMES

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EXECUTIVE SUMMARY

Background

The David and Lura Lovell Foundation, The Community Foundation for Southern Arizona, and Vitalyst Health Foundation began awarding Inclusion, Diversity, Equity and Accessibility (IDEA) grants in 2020 to support a more equitable workplace and accessible services. Over the course of five separate grant rounds between 2020 and 2023, more than \$550K was awarded to 31 primarily Southern Arizona nonprofits. These grants, ranging from \$5,000 to \$15,000, were given to support initial exploration of IDEA initiatives, as well as planning and implementation of initiatives already in process.

Overview of Grants

Type of Organizations Funded

The IDEA initiative funded 10 types of organizations among the 31 organizations: (1) Community Development (2) Arts and Culture (3) Mental and Physical Health (4) Education (5) Leadership Development (6) Grantmaking (7) Environment and Conservation (8) Media (9) Legal (10) Transportation.

IDEA Focus Areas

The funder collaborative aimed to provide an opportunity for organizations to fund any type of IDEA work and the grant application did not dictate the type of IDEA project that grantees had to submit. As a result, grantees submitted a range of IDEA projects, the majority of which focused on internal IDEA efforts with some including external programmatic efforts.

- Six different internal IDEA focus areas were identified across all grants: (1) Training and Education (2) Assessments (3) Frameworks & Plans (4) Human Resources (5) Other Organizational Policies (6) Workgroups and Committees
- Three different external IDEA focus areas were identified: (1) Changes to Programmatic Content (2) Increasing Community Outreach and Partnerships (3) Programmatic Measurement

Additional grant information:

- Average total IDEA project budget for organizations was \$33,266
- 27 out of 31 organizations mentioned having some type of internal IDEA work in their organization prior to this funding opportunity
- All but one grant proposal said they would utilize outside consultants or contractors to support them in their IDEA work. The proportion of funds used for consultants varied from 10% of the funding to 100%.
- In addition to offering \$5,000-15,000 grant funding, the funding collaborative provided a few additional supports to grantees in late 2021 including a discussion group, workshop and community of practice.

Impact of IDEA Grants

Range of Outcomes

Based on the self-reported outcomes from grantees, the impacts of the funding can be grouped into three categories reflecting the extent to which each organization “moved the needle” on IDEA work.

1. **Initiated** - catalyzed work in a particular focus area. Examples include:
 - Helped facilitate alignment between board members and staff
 - Helped initiate conversations about their organizational culture and led to the review and adaptation of policies and procedures
2. **Deepened** - strengthen a focus area they had already acknowledged
 - Increased BIPOC representation on the board
 - Improved compensation for college fellows who operate summer programs
3. **Expanded** - work extended beyond what was originally planned
 - Influenced decision by Board of Trustees to no longer have a Cultural Diversity Committee. Instead, the Board will include IDEA discussions into every committee.
 - Resulted in building a culture and a practice around IDEA and racial justice work that will continue to flourish as they grow into a larger and more complex organization

Next Steps for Organizations

The work done during this period will continue with many organizations, as they recognized that IDEA work requires an ongoing commitment rather than just a one-time activity. Several grantees expressed their intention to continue IDEA work even after the funding period ends

Ability to Leverage Funds

A few grantees reported that the IDEA capacity-building grant has helped them to secure additional funding to support this continued commitment.

Grantee Reflections

Grantees identified the following challenges with this work:

- **Project Overwhelm.** Many grantees found that developing and implementing their projects was challenging in and of itself. Grantees spoke of the “enormity” of their projects and the many moving parts and tasks involved, such as establishing new processes, creating content and tools, and finding partners and collaborators that align with the project goals
- **Competing Priorities.** Organizations struggled with competing priorities influenced by work overload, the need to adjust project timelines to team members’ schedules, and identifying needed resources.

- **Difficulty Developing a Collective Understanding of IDEA.** Some grantees encountered difficulties in implementing an IDEA lens within their organizations due to a lack of knowledge and experience. They struggled to find the right expertise and resources. Varying levels of understanding and commitment were observed, with staff often more advanced in IDEA issues than boards.
- **Lack of Organizational Readiness.** Some organizations acknowledged issues of white supremacy and a lack of diversity, while others found it challenging to initiate conversations about racism and equity within predominantly white teams.
- **Difficulty Connecting with the Community.** Some grantees encountered issues in recruiting community members, including reaching their target audience, understanding participation barriers, and establishing a representative sample size. Building relationships proved vital, as engaging alumni was more challenging than current participants.

Grantees shared what aspects were easiest for some:

- **Working with Shared Understanding of IDEA.** Teams that were enthusiastic, aligned, and had established processes, a culture of learning, moral responsibility, issue awareness, trust, and a long-term vision found it easy to initiate, collaborate on, and expand their IDEA projects, motivated by a commitment to racial equity and inclusivity.
- **Helpful Consultant Experience.** Funding for consultants allowed ideas to become realities, activated and propelled project areas further. They provided thought-partnership, technical assistance, networking, and much needed expertise and experience.
- **Ease with Community Relationships.** Some grantees had a positive experience with outreach, highlighting the importance of cultivating relationships with their participants or clients. Successful organizations met community members where they were, engaged them on pertinent issues, and leveraged their interest in IDEA work, resulting in effective recruitment for conversations, data collection, or skill-building opportunities.
- **Able to Support Staff and Community Leader Time.** Some of the funding ensured that people were adequately compensated for their time and labor. Funding was able to pay for leadership, staff and for some even community leader time so they could participate in IDEA work for the organization.
- **Easy Grant Process.** The majority of grantees interviewed shared that the grant process was accessible and easy, including the reporting requirements. Grantees described it as “straightforward”, “simple”, and “reasonable.”

Considerations for Organizations

After reviewing the data from interviews with grantees and funders, CEP identified **six** key considerations for organizations who aim to support this important work.

- **Begin with Leadership.** Several organizations that had buy-in at the leadership level, including board and executive staff, reported having an easier process in doing IDEA work within their organizations. These leaders set the tone and direction for the entire organization, shaping its culture and values.
- **Identify IDEA Priorities.** Several grantees shared the challenges of having multiple IDEA projects at a time and trying to balance competing priorities. Focusing on one to two IDEA organizational projects at a time can support effective implementation.
- **Partner with Consultants.** All but one project hired outside support. The majority of organizations explicitly mentioned having a positive experience with consultants helping them with their IDEA projects. Consultants bring specialized knowledge, experience, and expertise in navigating the complexities of IDEA initiatives.
- **Carry a Continuous Commitment.** Several organizations shared their commitment to continuing this work beyond the funding period. A continuous commitment to IDEA is vital for achieving meaningful change within an organization.
- **Anticipate Challenges Between Board Staff and Donors.** Some grantees expressed difficulty in convincing their board members about the importance of prioritizing IDEA work. Aligning board members, staff, and even donors around IDEA principles can be a daunting task that is further complicated by issues of race, power dynamics, and institutionalized biases.
- **Engage in Critical Conversations.** A few grantees mentioned that organizations must engage in critical conversations about how privilege, racism, whiteness, saviorism, and other issues challenge IDEA in their work. This can help identify blind spots in thinking and lead to the adaptation of plans to ensure that all voices are heard and considered.

Considerations for Funders

In reviewing grantee and funder interview data, CEP identified **eight** key considerations for funders who aim to support this important work.

- **Ensure Equal Opportunity.** One limitation of the initiative was that the application was not available to all nonprofits. Due to limited resources, funders in the collaborative only invited organizations they held existing relationships with to apply. Funders expressed their desire to be able to accept more applicants and make the process open to anyone interested in IDEA work.
- **Provide Adequate, Flexible and Multi-year Funding.** Grantees found the initial grant helpful but emphasized the need for ongoing funding to sustain their long-term efforts. The IDEA funding initiative empowered grantees to choose their internal projects. Flexible funding enables organizations to adapt and address root causes, with some grantees expressing the need for consistent, ample funding to achieve their IDEA goals. Funders can further support this work by committing to multi-year funding for organizations.

- **Offer Additional Non-Financial Support.** Overwhelmingly, grantees requested expert and peer support, specifically from people who have lived experience with racial equity and justice work.
- **Fund Organizations Led by Marginalized Communities.** Organizations with leadership from marginalized communities are often the most motivated to ensure that their internal practices do not perpetuate the same oppressive and harmful practices as the external systems.
- **Support Relationship Building Between Funders and Grantee.** The trust-based philanthropy¹ approach to grant-making emphasizes relationship-building, centers grantees' expertise and helps dismantle power imbalances.
- **Commit to Internal Work.** Funders, just like grantees, are also grappling with IDEA issues. Therefore, it is recommended that funders acknowledge the work related to IDEA capacity-building within their organizations.
- **Collect Baseline Data.** All funders expressed a desire for better baseline information from the grantees regarding their organization's IDEA capacity-building journey. They recommended using a measurement tool or a set of questions at the beginning and end of the grant cycle to better understand impact.
- **Maintain Easy Grant Making Process.** An easy, efficient grant application and reporting process reduces administrative burdens on organizations, freeing up valuable time and resources to focus on their mission.

¹ Trust-Based Philanthropy Project. [Online] Available at: trustbasedphilanthropy.org.

INTRODUCTION

Background

In 2020, Southern Arizona funders recognized a growing interest in organizational capacity building among their grantees in the areas of Inclusion, Diversity, Equity, and Access. The COVID-19 pandemic and the movement for racial justice further amplified this interest. In response to this, the Community Foundation for Southern Arizona (CFSA), the Jewish Federation of Southern Arizona (now Jewish Philanthropies of Southern Arizona), the David and Lura Lovell Foundation, the Women's Foundation of Southern Arizona (WFSA), and Vitalyst Health Foundation entered into a collaboration promoting education, understanding and capacity building around the ideals of IDEA known as the Southern Arizona IDEA Funders Collaborative. With the assistance of a Public Ally (AmeriCorps), the group was able to gather the necessary resources and information to guide their effort.

Since forming, the Southern Arizona IDEA Funders Collaborative has encouraged participating foundations to launch individual or joint initiatives in partnership with their grantees or the wider community. With the assistance of the [Center for Healthy Nonprofits](#), an initiative of CFSA which offers free and reduced cost training and workshops for nonprofit professionals, the group was able to increase IDEA awareness among nonprofit organizations.

In addition to the collaboration with the center, the IDEA grant initiative emerged as an opportunity to further this effort. The purpose of the IDEA grants was to support a more equitable workplace and accessible services. Three foundations participated in the grant initiative, The David and Lura Lovell Foundation, The Community Foundation for Southern Arizona, and Vitalyst Health Foundation. Although all funders did not participate in the IDEA grant initiative, they served as thought partners in the process. Currently, the collaborative meets quarterly and includes the following members: *The David and Lora Lovell Foundation, Community Foundation for Southern Arizona/Center for Healthy Nonprofits, Vitalyst Health Foundation, Tucson Electric Power, Piper Trust, Women's Foundation for the State of Arizona, YWCA of Southern Arizona, Jewish Philanthropies of Southern Arizona, and the Legacy Foundation.*

Over the course of five separate grant rounds with these three funders, more than \$550K was awarded to 31 primarily Southern Arizona nonprofits through the IDEA grant initiative. These grants, ranging from \$5,000 to \$15,000, were given to support initial exploration of IDEA initiatives, as well as planning and implementation of initiatives already in process.

In June 2023, the funders engaged Erica Glaze of [Live Wellthy](#) and Stephanie Luz Cordel of [All Voices Consulting](#), to assist them in learning about the funding experience and evaluating the effectiveness of the grant initiative. This report outlines the findings and recommendations from the evaluation.

Approach and Methodology

Informed by the Equitable Evaluation Framework² and Participatory Research Methods³, CEP conducted a qualitative and quantitative evaluation of the IDEA grants initiative. The evaluation focused on better understanding the grants and their impact to inform funding strategies for IDEA capacity-building work in the nonprofit sector through:

- Identifying the types of IDEA efforts funded
- Understanding organizations previous history with IDEA work
- Calculating the cost of IDEA efforts and proportion funded by this initiative
- Clarifying the impact of funding on organizations
- Identify strengths and opportunities in the grant process

To foster a collaborative, inclusive, and justice-oriented evaluation process, CEP facilitated a discovery session with The David and Lura Lovell Foundation, Vitalyst Health Foundation, and Community Foundation for Southern Arizona to understand each funder's learning goals. In addition, grantees were surveyed to identify what they would like to learn about the IDEA initiative and its impact.

Based on input from both groups, CEP invited all grantees to participate in a 1-hour informational interview and online survey (See Appendix A for list of evaluation questions). To avoid reinforcing historical patterns of inequity and hierarchies of power, interviewees received \$200 for participating in the conversation and survey participants received a \$20 gift card.

In addition to the interview and survey, the evaluation included a thorough review of the following grant materials:

- Grant Proposals
- Grantee Discussion Group Notes
- Final Reports

Throughout the process, the evaluation team made it clear that the aim was not to evaluate any particular organization, but to understand how the funding was beneficial and to use this information to inform effective funding strategies for IDEA capacity-building work in the Arizona nonprofit sector going forward.

Limitations

While the evaluation conducted by CEP provides valuable insights into the impact and effectiveness of the IDEA grants initiative and offers recommendations for future funding strategies, the following limitations must be acknowledged:

- **Data Collection** - Given that organizations were focused on their mission and day-to-day operations, some may have faced challenges with scheduling an

²See the Equitable Evaluation Initiative's [Equitable Evaluation Framework](#).

³Cornwall, A., & Jewkes, R. (1995). What is participatory research? *Social science & medicine*, 41(12), 1667-1676.

interview or completing the survey during the data collection period, which lasted just over two weeks. As a result, we interviewed 16 out of 31 organizations.

- **Project Timeline** - During the time of the evaluation process, the work for some projects was still ongoing. Some organizations reported that their project was a year long and would not be complete until a later date. Therefore, a final report was unavailable and impact was still in progress.
- **Power Dynamics** - Power permeates every aspect of philanthropy, and is ingrained in the relationship between funders and grantees. As one party has the resources that the other needs, a genuine partnership can be hindered by the resulting power imbalance. This dynamic can lead grantees to withhold honest feedback and feel compelled to paint a positive picture of their experience and organization when reporting to the funder.

OVERVIEW OF IDEA GRANTS

Grant Dollars

Between 2020 and 2023, the IDEA funding collaborative granted 39 grants totaling \$559,855 to 31 organizations (See Appendix B for full list of grantees). Each grant round funded grants between \$5k-\$15k to each organization. Some organizations received grants more than one year of funding for a total of up to \$30k for those organizations. Here is an overview of grant amounts:

Funding Received	Number of Organizations
\$5k	1
\$10-14k	4
\$15k	18
Over \$15k (received funding in more than one grant cycle)	8
Total	31

Types of Organizations Funded

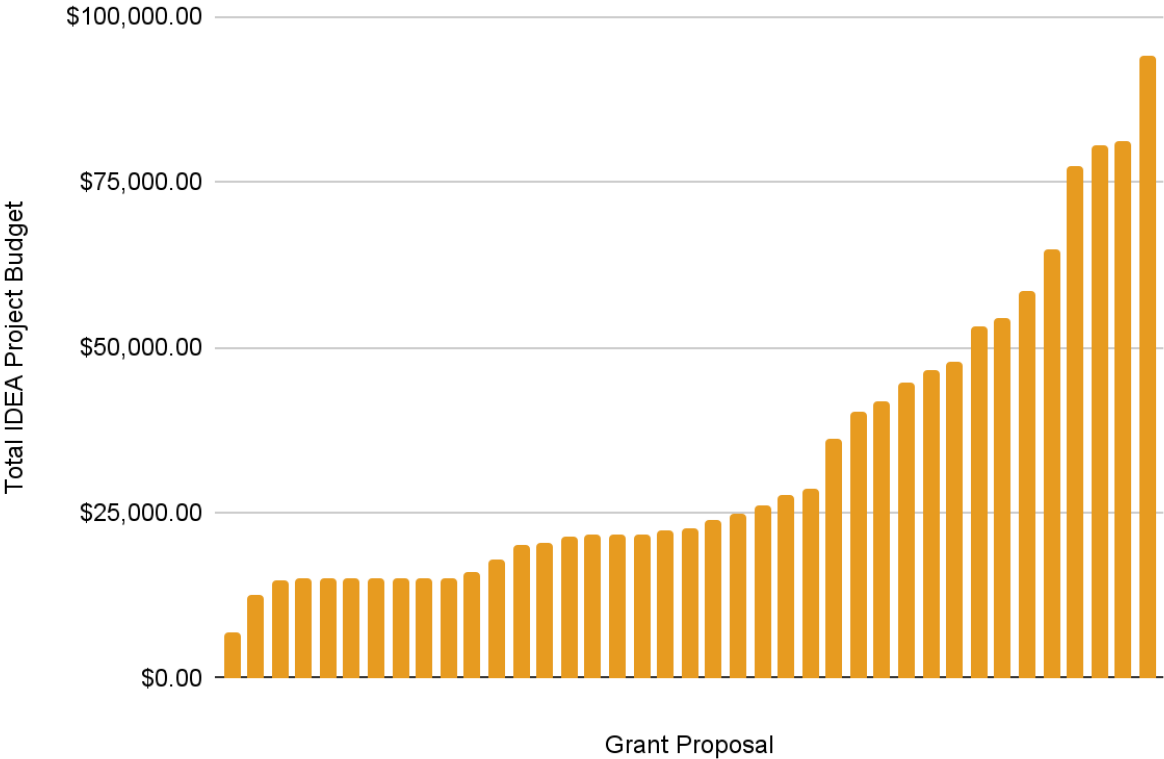
The IDEA initiative funded 10 types of organizations among the 31 grantees.

Type of Organization	Number of Grants	Amount Funded
Community development (range of services for the community of all ages with several programs)	10	\$150,000
Arts and Culture (This includes dance, theater, museums, and festivals)	9	\$132,355
Mental and Physical Health	6	\$72,500
Education (including youth and adult focus)	4	\$60,000
Leadership Development (including youth and adult)	4	\$60,000
Grantmaking	2	\$30,000
Environment & Conservation	1	\$10,000

Media	1	\$15,000
Legal	1	\$15,000
Transportation	1	\$15,000
TOTAL	39	\$559,855

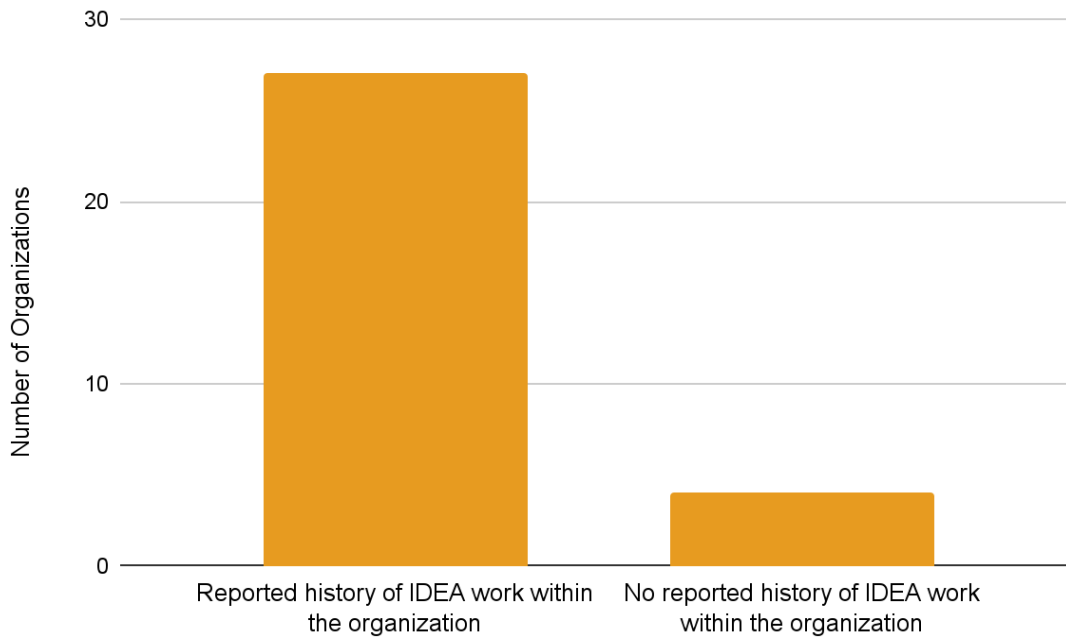
IDEA Project Total Budgets

To get a sense of the type of funding needed for IDEA efforts within organizations, CEP plotted the total project amounts for each funding proposal. **The average project budget for IDEA projects was \$33,266.**



History with Internal IDEA Work

When reviewing funding proposals, 27 organizations mentioned having some type of internal IDEA work in their organization prior to this funding opportunity and 4 did not mention any previous IDEA work in their organization.

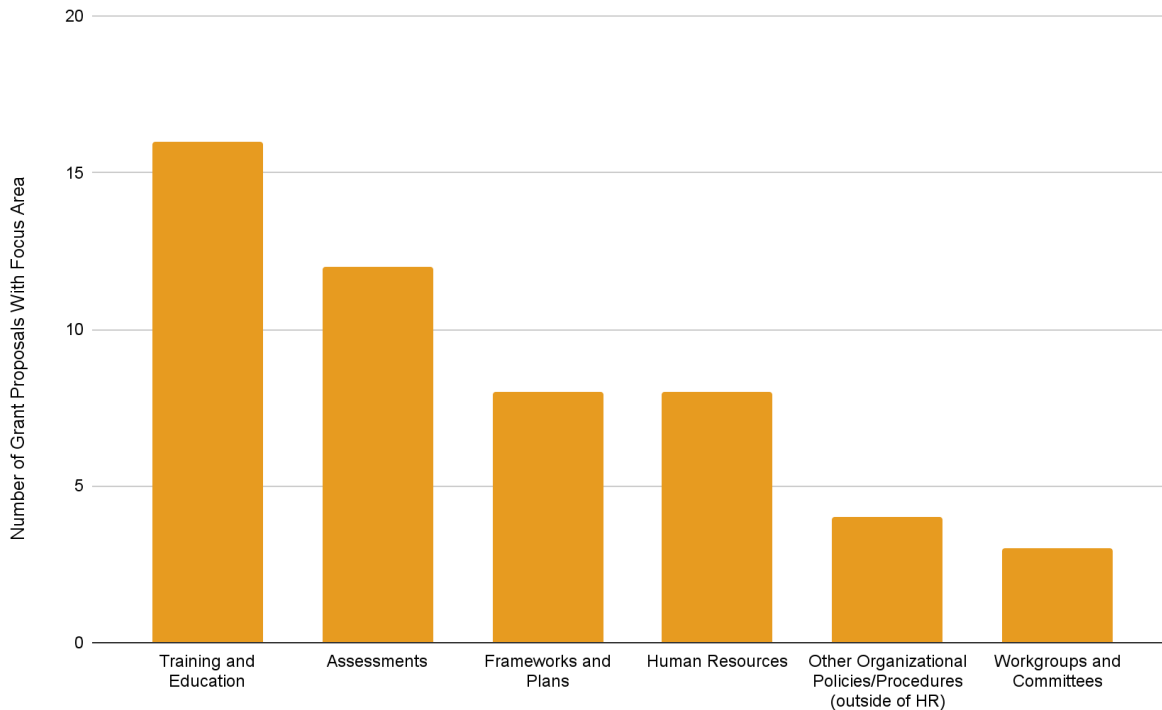


IDEA Focus Areas

The grants required a focus on organizational change and internal planning and development. IDEA efforts such as nonprofit organizational training and support, human resources policy development, as well as outreach and marketing to diverse constituencies and potential employees were supported. Funds could be used for staff salaries, consultation, and accompanying expenses. As a result, grantees submitted a range of IDEA projects, the majority of which focused on internal IDEA efforts with some including external programmatic efforts.

Internal IDEA Focus Areas

Six different internal IDEA focus areas were identified across all 39 grants.



Note: organizations often incorporated more than one component in their funding proposals. For example, one grant may have included an audit as well as development of a framework as their project. All focus areas for each grant have been included.

Training and Education

Training and Education was the most common IDEA focus area. Organizations that involved training as one of the IDEA funding focus areas participated in a range of educational opportunities for various groups at their organizations including staff, board, leadership as well as volunteers. The majority of the training for organizations focused on helping their staff in supporting different populations in their work. These types of training included spanish language learning, understanding situational and generational poverty, information about autism, working with LGBTQ+, serving immigrants and refugees, addressing barriers for those with disabilities and how to teach neurodivergent children. Other training was more specific to addressing racism such as implicit bias training, anti-blackness and allyship.

Assessments

Assessment was the next most common IDEA focus area. Organizations utilized a wide variety of assessment methods including listening tours, surveys, external consultant interviews and policy analyses. Some organizations conducted very broad assessments that focused on general progress in organizational diversity, inclusion and equity while others were very specific in their assessments such as understanding their staff experience with discrimination and racism.

Frameworks and Plans

Several organizations focused on developing a framework around IDEA issues and many infused IDEA in their strategic planning efforts. Organizations used the IDEA framework to critically examine their existing policies and practices, identify action steps to address gaps, and create a plan to achieve desired outcomes. They worked toward developing measurable, innovative, robust, and IDEA-aligned strategic goals that will support current initiatives and also address past and/or current challenges and needs. Some organizations completed this work in-house with their board and staff, others received support from consultants. One organization is engaging in ongoing evaluation and documentation of their progress while also giving space for staff to pause and course-correct, highlighting the importance of establishing and tracking process outcomes in addition to project outcomes.

Human Resources

Another focus area was improving recruitment and hiring practices to attract more diverse staff. Organizations focused their efforts on reviewing and updating their human resources policies regarding recruitment, hiring, staff training, current and future position descriptions and requirements, “inter-office relationships,” conflict management, and their employee handbooks to align with an IDEA framework. Organizations dedicated resources in the “production of marketing materials for hiring” and other content to increase inclusion and belonging amongst staff, engaged in targeted outreach to candidates for both staff and leadership positions, and partnered with other organizations to increase diversity in their recruitment. Some organizations also conducted a wage analysis and developed new positions to promote and advance IDEA practices and policies.

Other Organizational Policies and Procedures

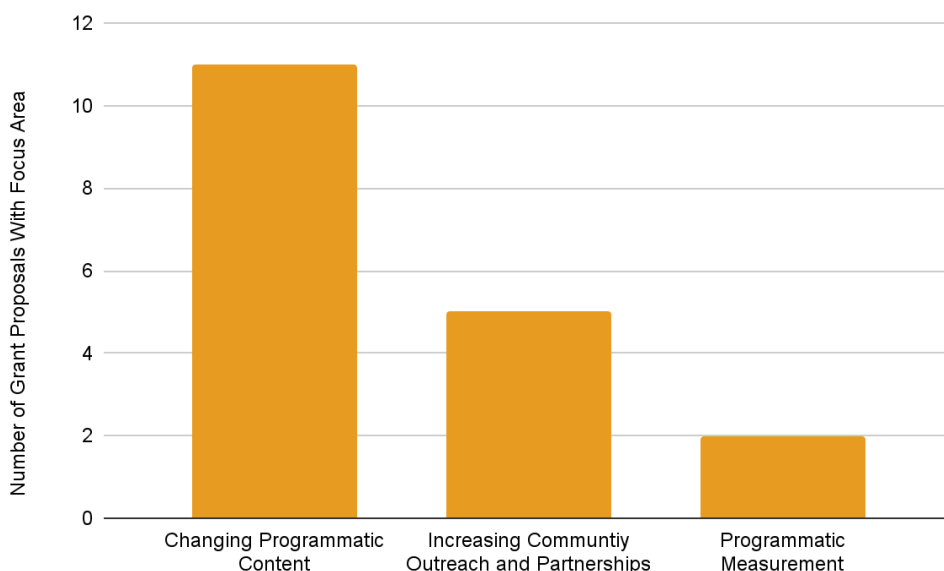
A few organizations worked toward improving internal “policies and procedures that promote inclusion, diversity and equity” more generally, outside of human resources, such as board recruitment practices and bylaws and other governing documents and principles that apply to all staff and leadership positions.

Work Groups and Committees

A few organizations included components in their grant proposals that included developing committees or workgroups to support them in their work. Examples include cultural diversity committee roundtables, developing a diverse and inclusive advisory board, and engaging in community conversations.

External IDEA Focus Areas

A handful of grant proposals included external IDEA efforts related to incorporating an aspect of IDEA in their programming. This type of work could be categorized into three areas.



Note: organizations often incorporated more than one component in their funding proposals. All focus areas for each grant have been included.

Changes to Programmatic Content & Materials

The most common focus area related to external IDEA efforts was changes to programmatic materials with a focus on increasing accessibility for programs. This involved changes such as translating programmatic materials to Spanish, adapting materials to reflect cultural identities of students and families, as well as assessments specifically focused on adapting programs in some way to increase program accessibility.

Increasing Community Outreach and Partnerships

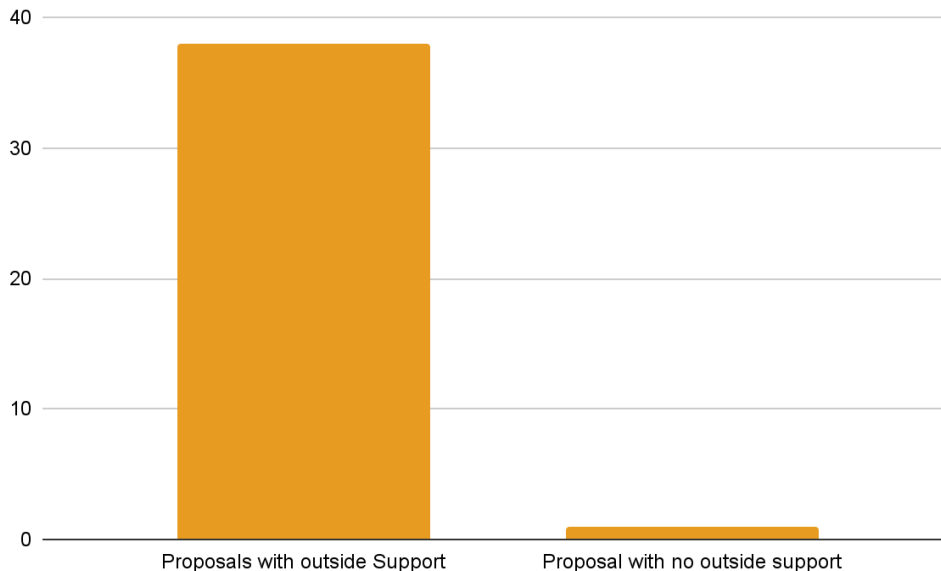
Another focus area related to external IDEA efforts was increasing community outreach and partnerships. Activities included implementing a more inclusive community engagement strategy, connecting with key stakeholders, and deepening relationships with partners.

Programmatic Measurement

A couple of organizations mentioned utilizing funds to develop programmatic evaluation tools to better understand the impact of their programs.

Involvement with Consultants

All but one grant proposal said they would utilize outside consultants or contractors to support them in their IDEA work. The proportion of funds used for consultants varied from 10% of the funding to 100%.



Additional Non-Financial Support

In addition to offering \$5,000-15,000 grant funding, the funding collaborative provided a few additional supports to grantees in late 2021.

Discussion Group

In August 2021, the collaborative offered grantees an opportunity to connect with other grantees as well as funders in a discussion to learn more about their projects, the impact and what additional support might be helpful. From this discussion, funders gained meaningful insight into the projects and grantees were able to exchange additional resources that had been helpful to them throughout their IDEA journeys. .

Service Never Sleeps (SNS): Allyship Workshop

Following this discussion, the funding collaborative offered all grantees an opportunity to participate in SNS's virtual Allyship training. 17 participants utilized this offer. The training was an intensive, two-day, fast-paced webinar series designed to explore how to understand and utilize individual and collective areas of social privilege to advance racial justice through an intersectional lens. Using SNS' CLAIM framework (Care, Learn, Act, Influence, Maintain), this training explored what it means to adopt an Allyship lifestyle. This

workshop aimed to equip participants with tools to be an active ally for racial justice through methods of naming privilege, centering Black, Indigenous, and people of color, navigating intersectionality across identities, influencing others, and continuing their own self-work journey.

Learning Community

To follow, the Center for Healthy the Nonprofits at the Community Foundation for Southern Arizona hosted a learning community for attendees to continue the conversation in the form of once a month, 1.5 hour virtual session beginning in December 2021 for three months.

IMPACT OF IDEA GRANTS

Range of Outcomes

Overall, the grant funding provided for IDEA capacity-building had a significant impact on the grantees. It helped several organizations initiate conversations about their organizational culture and led them to review and adapt their policies and procedures concerning IDEA. Many grantees stated that the funding and moral support from an external entity were critical during their discussions with their board, which ultimately validated the need for such work. They expressed that the grant was instrumental in helping them make progress toward their IDEA goals.

Based on the self-reported outcomes from grantees, the impacts of the funding can be grouped into three categories reflecting the extent to which each organization “moved the needle” on IDEA work.

1. **Initiated** - catalyzed work in a particular focus area
2. **Deepened** - strengthen a focus area they had already acknowledged
3. **Expanded** - work extended beyond what was originally planned

Examples of Initiated Work

- Helped facilitate alignment between board members and staff
- Helped staff become more culturally aware of what was represented in art, how to discuss art with IDEA principles in mind, and the power of perspectives
- Helped initiate conversations about their organizational culture and led to the review and adaptation of policies and procedures
- Allowed for a specific focus on communities of color with select programming
- Instrumental in making progress toward their IDEA goals
- Revealed blind spots in thinking and planning, and led to the adaption of a plan to ensure that all voices heard and considered
- Revealed the issues that need to be addressed within the organization to support the overall wellbeing of staff
- Helped gain clarity on how programs can be improved in terms of inclusion
- Funding validated pursuit of IDEA work within the organization (gave morale boost for staff) and proved the importance of this work to resistant board members
- Enabled an equity education series of events for various stakeholders connected to the organization

Examples of Deepened Work

- Increased IDEA capacity-building opportunities for staff and volunteers
- Increased program accessibility
- Increased BIPOC representation on the board
- Improved compensation for staff
- Contributed to the professional development of young immigrant professionals
- Provided major programs for students and educators in both English and Spanish

- Evaluated the organization's key communications (website, e-news, newsletter, org collateral) and documents such as the employee handbook through an IDEA lens
- Provided an opportunity to hire external facilitators and consultants to do a deeper dive into the organization
- Led to more intentional collaboration with partner organizations
- Community based work became more inclusive and diverse

Examples of Expanded Work

- Influenced decision by Board of Trustees to no longer have a Cultural Diversity Committee. Instead, the Board will include IDEA discussions into every committee.
- Resulted in strategic planning that yielded a Strategic Blueprint as well as an alignment with national movement
- Resulted in building a culture and a practice around IDEA and racial justice work that will continue to flourish as they grow into a larger and more complex organization
- Recognized importance of offering financial compensation for people of color who share their expertise and experience in our educational platforms
- Allowed for community members to be compensated for interpretation services
- Promoted IDEA work throughout all organizational planning
- Led to additional funding to continue IDEA work within the organization

Next Steps for Organizations

During the funding period, the IDEA funds had an impact on the grantee organizations in numerous ways. The work done during this period will continue with many organizations, as they recognized that IDEA work requires an ongoing commitment rather than just a one-time activity. Several grantees expressed their intention to continue IDEA work even after the funding period ends. Here are some examples of this continued commitment:

- Planning to do a policy audit this year
- Continue meeting regularly with IDEA staff team to identify new trainings and track progress
- Trying to integrate IDEA into Human Resources work and recruitment of volunteers and board members
- Looking to get professional development for the board
- Diversity, Equity and Inclusion (DEI) focused executive coaching for leadership
- Continue community accessibility trainings

Ability to Leverage Funds

A few grantees reported that the IDEA capacity-building grant has helped them to secure additional funding to support this continued commitment. One recipient mentioned that they successfully applied for and obtained funding from another foundation, and utilized the Lovell grant as a reference to bolster their credibility. Another recipient stated that they received support from an individual donor to further their IDEA work. Additionally, one grantee was able to secure funding for a policy audit with the support of the Lovell Foundation. While some recipients have yet to leverage additional funding, they anticipate being able to do so in the future.

REFLECTIONS FROM GRANTEES

Challenges Implementing IDEA Work

The following themes emerged as grantees discussed the challenges they faced with implementing their IDEA projects.

- Project Overwhelm
- Competing Priorities
- Difficulty developing a collective understanding of IDEA
- Lack of Organizational Readiness
- Difficulty connecting with the community

Project Overwhelm

Many grantees found that developing and implementing their projects was challenging in and of itself. Grantees spoke of the “enormity” of their projects and the many moving parts and tasks involved, such as establishing new processes, creating content and tools, and finding partners and collaborators that align with the project goals. A handful of grantees talked about the difficulty in accurately assessing organizational and individual capacity to successfully carry out the projects. “There is so much to be done and it's one of me managing the project.”

Competing Priorities

Organizations struggled with competing priorities influenced by work overload, the need to adjust project timelines to team members’ schedules, and identifying needed resources. Many also reflected on the importance of scaling projects to allocated budgets and timelines, and having to make strategic decisions based on organizational needs and the amount of funding they had. “It was stretching the dollar amount to see what to take care of now and what to focus on later.”

“[Biggest challenge was] narrowing down which strategy we could do, because there were so many we wanted to do, so limiting ourselves based on the amount of funding.” -Grantee

Difficulty Developing a Collective Understanding of IDEA

Another challenge that was noted by a handful of grantees was not knowing the process to implement a IDEA lens structurally or programmatically within their organizations. Some grantees recognized the lack of organizational expertise and experience with IDEA work, and got stuck in trying to determine who can be called in to answer their questions and guide their projects. One organization boldly turned inward and began examining their internal operations and processes as they realized this gap in knowledge and skill. “Slowly our focus went to the training component to what is critical about our onboarding process

and ongoing professional development? What journey do we want to take our team on to build a foundation? We had to decide...we had to learn the way we do the work is as important as who we serve." A couple of grantees also noted the varying degrees of understanding and buy-in internally. For example, one grantee shared that their staff had progressed in understanding racial justice issues and equity, but their board needed significantly more time and training to move in their analysis.

"How to get started doing this work was the most difficult." -Grantee

Lack of Organizational Readiness

Relatedly, grantees were vulnerable and honest in sharing examples of white supremacy and other forms of oppression within their organizations. "We have a lot of white people on the board that are not understanding the issues of privilege and racial justice. It's kind of all new to them." One grantee shared how difficult it was to talk about racism and equity when their organization had "an overwhelming attitude of whiteness and superiority of whiteness," and the progress they were able to make in their racial equity work by intentionally bringing in more people of color. They are now looking toward opportunities for trans, queer, disabled, and Indigenous folks. Another organization is still building trust with their team and is struggling to determine their readiness to have these kinds of conversations.

"Our team is mostly Caucasian, European and a lot of folks weren't ready to have the conversation or didn't understand the necessity to dive deep and to look at historical impacts." -Grantee

Difficulty Connecting with Community

Some grantees had difficulty recruiting community members to participate in their projects. Specifically, grantees wrestled with outreach to their target audience and understanding why people were not participating. For example, one organization struggled to recruit alumni of their program but was able to easily involve current participants, emphasizing the importance of building and maintaining relationships with constituents and moving away from transactional engagement of community members. Technical aspects of recruitment were also challenging, such as determining a representative sample size.

Easiest Aspects of Implementing IDEA Work

Organizations that had internal commitment and buy-in for IDEA work from their leadership, staff, volunteers, and board members experienced ease in implementing their projects, even despite other technical or logistical challenges.

- Working with shared understanding of IDEA
- Helpful Consultant Experience
- Ease with Community Relationships
- Able to Support Staff and Community Leader Time
- Easy Grant Process

Working with Shared Understanding of IDEA

Teams that were ready, motivated, excited, and in agreement about the necessity for IDEA work within their organizations found it easy to get started, outline the work, collaborate to troubleshoot and solve problems, and think to the future to continue and expand their projects.

Grantees highlighted reasons why their teams were committed and bought in:

- An established process for study and discussion regarding IDEA
- A culture of learning, embracing change, and leaning into hardship and uncertainty
- Moral and personal responsibility to the work
- An awareness of the issues that the organization needs to address
- Trust and a sense of community between team members
- A willingness to take risks
- A long-term vision for a racially just organization and world

“Working with our board members helped us understand there is no right or wrong answer and it is a learning process...We had to rethink our steps of what we could take today and how to move it forward and getting to that was really good for all of us.” - Grantee

Helpful Consultant Experience

In addition to impactful organizational commitment and community involvement, grantees talked about the tangible resources that made their lives easier in developing and implementing their projects by being able to utilize consultants to support them. Funding for consultants allowed ideas to become realities, activated and propelled project areas further. They provided thought-partnership, technical assistance, networking, and much needed expertise and experience.

Ease with Community Relationships

In contrast to one of the challenges mentioned previously, a few grantees talked about how straightforward outreach and recruitment was, reinforcing the need for organizations to

intentionally cultivate relationships with their constituencies. Organizations that were effective in meeting community members where they are at, connecting with them on issues that matter most to them, and leveraging their interest and readiness for IDEA work were successful at recruiting participants and engaging them in meaningful conversation, data collection, or skill-building opportunities.

Able to Support Staff and Community Leader Time

Some of the funding ensured that people were adequately compensated for their time and labor. Funding was able to pay for leadership, staff and for some even community leader time so they could participate in IDEA work for the organization.

Easy Grant Process

The majority of grantees interviewed shared that the grant process was accessible and easy, including the reporting requirements. Grantees described it as “straightforward”, “simple”, and “reasonable.” The grant application process was streamlined by one funder (Lovell) collecting all of the applications. Once application decisions were made, each funder then processed the recipients that they were responsible for funding, in their own grant management system (See Appendix C and Appendix D for the grant application and final report questions).

CONSIDERATIONS FOR ORGANIZATIONS

After reviewing the data from interviews with grantees and funders, CEP identified **six** key considerations for organizations who aim to support this important work.

1. Begin with Leadership
2. Identify IDEA Priorities
3. Partner with Consultants
4. Carry a Continuous Commitment
5. Anticipate challenges between board staff and donors
6. Engage in Critical Conversations

Begin with Leadership

Several organizations that had buy-in at the leadership level reported having an easier process in doing IDEA work within their organizations. Starting with the board and organizational leadership is paramount when embarking on internal IDEA initiatives. These leaders set the tone and direction for the entire organization, shaping its culture and values. By prioritizing IDEA at this level, a powerful message is sent throughout the organization that these principles are not just buzzwords but fundamental pillars of its identity. Board and leadership commitment ensures that IDEA efforts are integrated into strategic planning, resource allocation, and decision-making processes. Moreover, their active involvement helps foster a culture of accountability, making it clear that IDEA is not an optional add-on but a core element of the organization's mission. In this way, starting at the top paves the way for meaningful and lasting change, promoting an environment where everyone, regardless of background, can thrive and contribute to the organization's success.

Identify IDEA Priorities

Several grantees shared the challenges of having multiple IDEA projects at a time and trying to balance competing priorities. Focusing on one to two IDEA organizational projects at a time can support effective implementation. This approach can ensure that resources and attention are concentrated, enabling thorough planning, execution, and measurement of outcomes. It aligns projects with the organization's mission and encourages deeper engagement from stakeholders, fostering meaningful and sustainable progress in building inclusive and equitable organizations.

Partner with Consultants

All but one project hired outside support. The majority of organizations explicitly mentioned having a positive experience with consultants helping them with their IDEA projects. Consultants bring specialized knowledge, experience, and expertise in navigating the complexities of IDEA initiatives. They offer fresh perspectives and objective insights, helping organizations identify blind spots and uncover opportunities for improvement. Moreover, consultants can facilitate difficult conversations, guide strategic planning, and

provide tailored guidance to address specific challenges. Their support not only accelerates the progress of IDEA efforts but also ensures that they are well-informed and aligned with best practices. In essence, consultants serve as invaluable partners in the journey toward building more inclusive, diverse, equitable, and accessible organizations, contributing to both short-term successes and long-term cultural transformation.

Carry a Continuous Commitment

Several organizations shared their commitment to continuing this work beyond the funding period. A continuous commitment to IDEA is vital for achieving meaningful change within an organization. It signals that IDEA is an ongoing priority, fostering adaptability, trust, and innovation. It underpins efforts to address disparities, promote inclusivity, and drive lasting transformation. A sustained commitment to IDEA also reinforces the organization's accountability and responsibility in contributing to a more equitable and inclusive society.

Anticipate Challenges Between Board, Staff and Donors

Some grantees expressed difficulty in convincing their board members about the importance of prioritizing IDEA work. One organization shared that a few white board members were not in favor of putting energy into this work, which created tension with the BIPOC board members. Additionally, another grantee mentioned that they lost a donor due to their focus on IDEA and were told that they were too focused on being inclusive.

Aligning board members, staff, and even donors around IDEA principles can be a daunting task that is further complicated by issues of race, power dynamics, and institutionalized biases. It is crucial for organizations to have open and honest conversations about these issues, to invest time and resources into creating a culture that embraces IDEA, and to prioritize the voices and perspectives of marginalized communities.

Engage in Critical Conversations

A few grantees mentioned that organizations must engage in critical conversations about how privilege, racism, whiteness, saviorism, and other issues challenge IDEA in their work. This can help identify blind spots in thinking and lead to the adaptation of plans to ensure that all voices are heard and considered. Furthermore, by participating in such discussions, organizations can increase their awareness of these issues, challenge their assumptions and biases, and develop a shared understanding of the importance of inclusive practices.

CONSIDERATIONS FOR FUNDERS

Most organizations mentioned that they had already initiated IDEA work in their organizations before this funding opportunity. This indicates that despite the lack of large-scale funding opportunities in Arizona, organizations recognize the importance of this work and are already working towards improving their internal functioning to carry out their missions better. After reviewing the data from interviews with grantees and funders, CEP identified **eight** key considerations for funders who aim to support this important work.

1. Ensure Equal Opportunity
2. Provide Adequate, Flexible and Multi-year Funding
3. Offer Additional Non-Financial Support
4. Fund Organizations Led by Marginalized Communities
5. Support Relationship Building Between Funders and Grantees
6. Commit to Internal Work
7. Collect Baseline Data
8. Maintain Easy Grant Making Process

Ensure Equal Opportunity

One limitation of the initiative was that the application was not available to all nonprofits. Due to limited resources, funders in the collaborative only invited organizations they held existing relationships with to apply. Funders expressed their desire to be able to accept more applicants and make the process open to anyone interested in IDEA work. There may have been organizations that could have benefited from funding, but unfortunately, they did not have the opportunity to apply. Future funding opportunities should be open to all.

Provide Adequate, Flexible and Multi-year Funding

Adequate

When asked about the funding the grantees received and whether it was adequate to meet their needs, many organizations expressed appreciation for the grant. They stated that the funding amount was enough to initiate a new project or strengthen an existing one. While the grant provided a good foundation, grantees also mentioned that additional funding would be necessary to maintain their efforts in the long term. Although IDEA grants ranged from \$5-15,000, based on the analysis by CEP, the average amount needed to fulfill an IDEA project is \$33,266.

Funders also shared similar sentiments. They did not believe the grants would lead to immediate transformative change due to the amount and understanding that capacity-building work takes time. They agreed that additional funding would be necessary but questioned if IDEA capacity-building work should be funded separately or built into existing grants. While including funds in existing grants would make the process smoother, there were concerns that the work might be overlooked and left undone. On the other

hand, separate funding could draw attention to the issues and empower staff leading the IDEA work within their organization. This is a critical issue for funders moving forward, and hopefully both will be available.

Flexible

The IDEA funding initiative allowed for grantees to determine what type of internal project they wanted to focus on. Flexible funding from funders allows these organizations to adapt, innovate, and address root causes effectively. This type of funding enhances their resilience and impact, enabling them to respond to unforeseen challenges and opportunities. By providing flexible support, funders demonstrate their commitment to lasting social change, acknowledging that rigid funding can hinder progress in inclusion, diversity, equity, and accessibility work.

Multi- Year

A lack of funding to pay for consultants' support and also fully implement projects was a consequential barrier for some organizations. "We did have an HR consultant this year [to help us update or create an employee manual] but not sure if we will continue to have funding for that." One grantee shared their positive experience of working with a consulting agency that has dedicated years to building an IDEA department, which has positioned their consultants to offer invaluable support to the grantee to overcome barriers, remain focused on the vision, and build IDEA analysis and skills. This organization also has stable financial support to pay for these consultants, again pointing to the need for consistent and ample funding for organizations to meet their IDEA goals. Funders could support this deeper work by committing to providing funding to organizations for more than one year.

Offer Additional Non-financial Support

When asked during interviews, the majority of grantees had something to say when asked about additional non-financial support that would have been helpful to their organizations.

Expert and Peer Support

Overwhelmingly, grantees requested expert and peer support, specifically from people who have lived experience with racial equity and justice work. "Connections to consultants, connections to people who do this kind of work." Folks were in need of guidance, coaching, training, recommendations, advice, thought-partnership, problem-solving in real time, strategic-planning, and networking with other organizations that are also learning and growing. One grantee offered the idea of creating a "community of practice" that connects organizations to experts and funding, promotes peer learning, and provides resources for organizations to launch projects. A few grantees did not know where to look for help, and asked for vetted IDEA resources that can be shared with their teams, case studies, information from racial justice practitioners and innovators, and "a list of IDEA consultants that would give a two-hour consultation."

Other resources and supports that would have been helpful include:

- A list of accessible community resources specific to projects
- Information about the resources within a particular geographic area (e.g., “Knowing more about Tucson and where large meeting rooms were located, and who would offer their spaces”)
- Skill-building around inclusion and communication within a team
- Trainings on best practices for ethical and culturally appropriate data collection, analysis, and reporting (e.g., “Evaluation and tracking of demographics and impact, that has been tough”)
- “Things like access to printing” and other resources to meet organization’s advertising needs

Fund Organizations Led by Marginalized Communities

One particular grantee pointed out that serving a marginalized community versus having leadership from those communities can often have different sets of organizational practices and programmatic approaches. Organizations with leadership from marginalized communities are often the most motivated to ensure that their internal practices do not perpetuate the same oppressive and harmful practices as the external systems. They are also best equipped to connect with and understand the needs of communities that have traditionally been excluded or underrepresented. They can use their expertise to create programming and initiatives that are culturally relevant, impactful, and sustainable. Supporting these organizations not only helps to address systemic inequities, but also promotes the development of more equitable and just communities overall. Ultimately this approach can also rectify historical disparities in funding.

Support Relationship Building Between Funders and Grantees

One of the recommendations made by the funding organizations was to establish a stronger relationship between funders and grantees by following best practices. For instance, the trust-based philanthropy⁴ approach to grant-making, which emphasizes relationship-building, centers grantees' expertise and helps dismantle power imbalances. This approach also encourages unrestricted and multi-year funding, simplifying paperwork, and engaging in active communication with the grantees.

Commit to Internal Work

Funders, just like grantees, are also grappling with IDEA issues. Therefore, it is recommended that funders acknowledge the work related to IDEA capacity-building within their organizations. It would be beneficial for funders to engage in honest conversations with grantees about their internal work and to be transparent about their progress and challenges. Funders should be willing to accept criticism and engage in crucial conversations to create a more inclusive and equitable funding ecosystem.

⁴ Trust-Based Philanthropy Project. [Online] Available at: trustbasedphilanthropy.org.

Collect Baseline Data

All funders expressed a desire for better baseline information from the grantees regarding their organization's IDEA capacity-building journey. They recommended using a measurement tool or a set of questions at the beginning and end of the grant cycle. For example, the grantees can be asked to rate their organization's current position in regards to IDEA efforts on a scale and then rate it again after receiving the funding. This would help funders understand the impact that was made because of the grant. It also provides the grantees with a way to assess the outcome of their efforts and, if necessary, help them make informed decisions about where to focus their future work.

Maintain Easy Grant Making Process

Several organizations appreciated the ease of the grant process. Streamlining the grant process for grantees is a strategic move that can significantly enhance the impact of funders' support. An easy, efficient grant application and reporting process reduces administrative burdens on organizations, freeing up valuable time and resources to focus on their mission. It also encourages a wider pool of organizations to apply for funding, promoting diversity and innovation within the grantee community. Moreover, simplicity in grant processes fosters transparency and trust between funders and grantees, as clear guidelines and straightforward communication contribute to a healthier working relationship. Ultimately, when funders prioritize an easy grant process, they empower grantees to channel their efforts toward achieving their mission, maximizing the positive change their funding can bring to the communities they serve.

CONCLUSION

The David and Lura Lovell Foundation, The Community Foundation for Southern Arizona, and Vitalyst Health Foundation collaborated to provide grant funding for organizational change and internal planning and development around the ideals of IDEA. Based on the evaluation conducted by CEP, it can be concluded that organizations greatly benefited from the grant initiative. Grantees experienced a range of outcomes from initiating work within their organizations to continuing to improve organizational culture through an IDEA lens.

The majority of grantees also acknowledged how challenging this work can be and the importance of continued funding to be able to address the complexities that come up around doing this work internally. Ideal funding for this work would be flexible, multi-year, approximately \$30,000 grants open to all organizations seeking to improve inclusion, diversity, equity and accessibility within their organizations.

CEP sought to conduct an evaluation process that reflected the values of IDEA by gathering initial feedback from grantees and paying for their time to participate. Some grantees reported that they had never been asked to be involved in an evaluation, nor had they ever been paid for their time. If philanthropic organizations are genuinely committed to ensuring equity, this is something they must take into account. When working on IDEA projects, those who are most affected by decisions can provide unique and valuable insights, but they are often the least consulted. CEP and the funders agree that stakeholders should be compensated for their time and expertise.

Ultimately in the nonprofit sector, funding for inclusion, diversity, equity, and accessibility work is not just a choice but an essential requirement. Nonprofits, committed to addressing societal challenges and driving positive change, must lead by example in promoting diversity and fostering inclusivity. Adequate funding for IDEA initiatives enables nonprofits to cultivate inclusive and equitable environments within their own organizations, aligning their internal practices with their missions. Furthermore, these funds empower nonprofits to extend their reach and impact, ensuring that their programs and services are accessible to all communities, regardless of background or ability. In a world characterized by increasing diversity, the imperative to address systemic disparities and advance social justice makes investing in IDEA work within the nonprofit sector a crucial step toward creating a more equitable and inclusive society.

“Nonprofits are trying to solve social problems and cannot solve those problems if your structure and organization is perpetuating those problems they are saying they want to solve.” -Grantee

APPENDIX A: Evaluation Questions

Grantee Interview Questions

Connection to the Project

- What is your role in/connection to the project?

Impact and Funding

- What did you think of the amount your organization received for your capacity building effort?
 - Was it enough for addressing a need in your organization? Why or why not?
- How did the project impact your organization?
 - What did it enable you to do?
- How has this work helped you get closer to your IDEA goals? In what ways?
- Did this funding result in leveraging other funds or support?
- What are the next steps with this capacity building work, assuming funding is available?

Lessons Learned

- What was the most challenging part of the project?
- What was the easiest part of the project?
- What additional non-financial support would have been helpful to you?

IDEA (Inclusion, Diversity, Equity and Accessibility) capacity building/funding

- Have you ever received IDEA funding before?
- What are your thoughts on funders prioritizing IDEA as a need in the sector?
- What do you see as the future of IDEA work in nonprofit organizations?
- What do you think are the biggest funding needs for the nonprofit sector?

Grant Process

- How was the experience applying for this grant?
- Which aspects of the process were easiest/most challenging?
- Was the limitation that the scope of work had to include an internal component problematic in any way? If so, please let us know how.
- Do you have any suggestions on how to make the process more accessible to grantees?

Grantee Survey Questions

Project Info

- What is your connection to the project?

Project Impact (skip this section if your project is not complete)

- How did this project impact your organization?
- What are your biggest takeaways from this project experience?
- What next steps do you have for IDEA capacity building in your organization?

Support For Your Organization

- In late 2021 the funding initiative provided some additional supports: (we included info about this in the dropbox documents)
 - a. Did you/your organization participate in the discussion group with the IDEA funders Yes/No and if so, how would you rate its usefulness for your own learning or impact on your initiative? 1-5
 - b. Did you/your organization participate in the Service Never Sleeps (SNS) Workshop (Yes/No) and if so, how would you rate its usefulness for your own learning or impact on your initiative? 1-5
 - c. Did you/your organization participate in the Community Foundation of Southern Arizona sponsored learning community following the SNS Workshops/no and if yes, how would you rate its usefulness for your own learning or impact on your initiative? 1-5
 - d. What additional non-financial support would have been helpful to you?

Grant Processes

- What feedback do you have about the grant application process?
- Was the limitation that the scope of work had to include an internal component problematic in any way? If so, please let us know how.

Funding IDEA Work in the Sector

- What feedback do you have for philanthropic leaders on funding IDEA projects in Arizona ?

Funder Interview Questions

IDEA Funding in the sector

- From your vantage point, why is IDEA funding needed in the nonprofit sector?

Partner Experience

- What was your experience partnering with the funders in this collaborative? What worked well? What changes would you make?

Grant Processes

- Any changes you would make to the grant application process for future funding?
- Any changes you would make to the reporting process for future funding?

Lessons learned So Far

- Are there any lessons you've identified so far in the journey that would inform future IDEA funding?
- Anything else to note about the funding experience?

APPENDIX B: List of Grantees

- Academic Consortium for Integrative Medicine and Health
- Act One
- Arizona Community Health Workers Association
- Arizona Theatre Company
- Ben's Bells Project
- Boys to Men Tucson, Inc.
- Catholic Community Services of Southern Arizona
- El Rio Santa Cruz Neighborhood Health Center, Inc.
- Girl Scouts of Southern Arizona
- JobPath, Inc.
- Lead Guitar
- Lift our Voices
- Living Streets Alliance
- National Alliance on Mental Illness Southern Arizona
- Our Family Services
- Pima Council on Aging
- ScholarshipsA-Z
- Sky Island Alliance
- Social Venture Partners Tucson
- Sound Mind Live
- Southern Arizona Senior Pride
- Southwest Folklife Alliance
- The Carter Center, Inc.
- The Drawing Studio
- Tu Nidito
- Tucson Children's Museum Inc. dba Children's Museum Tucson
- Tucson Jewish Community Center
- Tucson Museum of Art and Historic Block
- Women Moving Millions
- Women's Foundation for the State of Arizona
- YWCA of Southern Arizona

APPENDIX C: Grant Application Questions

1. Grant Name
2. Total Amount Requested from Lovell Foundation
3. Organizational Mission Statement. State your organization or partnership's mission or vision statement.
4. Purpose. Describe where you see your organization at this time in addressing IDEA issues with all your stakeholders: board, staff, volunteers, clients, constituents, audiences, etc. How will Lovell Foundation funds be used to further your efforts? Include key information such as:
 - Target audience (who will benefit)
 - Changes in processes/policies
 - Broader initiative this grant will support
 - Measures of success for the project
 - How your Board of Directors is supporting your efforts/this proposal
5. Outside Resources. Please identify any outside resources, purchases, or consultants you will be engaging, if known.
6. Grant Budget. Provide a budget for this grant request. Include the following: sources of income, including your request to us and any other cash or in-kind support, and expenses, including any indirect (fiscal sponsor fees, administrative overhead).
7. Organization Budget. Use your most recent annual budget.
8. Financial Statements. Provide your organization's most recent financial statements - Statement of Activities (Profit & Loss) and a Balance Sheet.
9. Anticipated Start Date
10. Anticipated Completion Date
11. Additional Information (Optional). Please describe and/or upload any additional information you would like us to have about your

APPENDIX D: Final Report Questions

1. Grant Name
2. Amount Awarded
3. Purpose
4. Final Grant Status. Please provide a narrative report on actual implementation and results of the project, including if/how the project moved your organization forward with regard to inclusion, diversity, equity, and access; whether the goals of the project were fully accomplished, why/why not; what organizational change did the project bring about or opportunity/ies did it identify.
5. Sources and Uses of Funds. Provide or upload a line-item budget specifically identifying the use of Lovell Foundation funds.

APPENDIX E: Grantee Highlights

During the granting period, the Lovell Foundation connected with a few grantees to dive deeper into how the grant funds had impacted their organizations. Highlights from three organizations have been included here: Tucson Children's Museum, the Drawing Studio, and Tucson Jewish Community Center.

Tucson Children's Museum



Building on a commitment to accessibility, Children's Museum Tucson (CMT) used the IDEA grant from The David and Lura Lovell Foundation to hire a consultant to evaluate CMT's inclusion and diversity strengths and weaknesses and make recommendations for improvement. LeCroy & Milligan (LMA), a Tucson-based research and evaluation firm was engaged to conduct CMT's Making IDEA Reality assessment.

LeCroy & Milligan used several methods to survey the community about who was left out of the Children's Museum experience and identify other barriers beyond the price of admission. "What we found was that many community members did not see themselves reflected at the Museum," said Hilary Van Alsborg, Executive Director of CMT.

LMA identified six types of access to target for improvement: cultural inclusion, language access, community building, economic access, disability access and sensory access. Hilary said, "The study supported by the Lovell Foundation has launched us into making the IDEA conversation front and center in everything we do. How do we make sure that we are being as inclusive as possible?"



To help eliminate the language barrier, CMT applied for and received a three-year grant from the Institute of Museum and Library Sciences to introduce Spanish language

programming, hire Spanish-speaking program staff and make all print materials available in Spanish.

Previously school tours were only available in English. Now CMT offers 13 different field trips or school tours in both English and Spanish; programs can be presented at the same time in both languages when children visit the Museum. Families can now see that CMT reflects the community and is an important resource for their culture. To create awareness of the changes, CMT has invested in Spanish language advertising, including radio, TV and billboards.

Hilary said, “Now we ask ourselves, where are our biases? Where are our hidden blinders? How are we as an organization serving the Spanish-speaking community? Our culture has changed, and our board and staff are invested in the work we’re doing. That just builds upon itself.”



One example of the change can be seen in the STEM exhibit at the Museum entrance. There used to be quotes from well-known recognized scientists, like Einstein. Hilary said, “We realized that’s not what we want to project at all. So now we have a rotating display of local scientists, focused on non-traditional representative populations within the science community. For instance, we feature a young scientist who’s working on the OSIRIS REX project, and a

Mariachi instructor talking about the music-science connection.”

With the new STEM exhibit, CMT is creating the awareness that anyone can be a scientist. Hilary said, “That scientist grew up in your backyard and likes rocks like you like and now they’re a geologist. You don’t have to be born into a certain family or you don’t have to go to a certain school. You can just be a scientist. Science is everywhere.”



Another way CMT is increasing accessibility is through Discovery Nights every Thursday. “As a staff we said, let’s offer an evening program where families can come after work,” said Hilary. “Let’s make it free and provide cultural programming about growing up in the Sonoran Desert, all in Spanish. Let’s make sure it’s

advertised throughout the community.” Discovery Night has turned into the museum’s most popular event.

As CMT has become bilingual, Hilary points out the need to compensate staff for the ability to speak Spanish, in the same way that other skills command higher compensation: “We are honoring that this is something we value and it’s a skill set you bring that makes us a better children’s museum.”

Beyond becoming a bi-lingual community resource, CMT continues to work on increasing cultural awareness of its staff. The Museum has partnered with groups like Owl & Panther to do trainings on what it’s like to work with families who have been displaced and have gone through trauma. “As a staff we need to not judge whoever shows up,” said Hilary. “We need to widen our lens to families who are far from home and have experienced horrific things. They’re going to show up however they can, and it can be difficult for them to engage in a public setting.”



Inclusiveness also means serving children with special needs. MyTime is an inclusion program that welcomes families and children who are in need of supportive experiences and a quieter, sensory-controlled visiting time. Before the pandemic, it was only offered one day a month on Saturday. Hilary said, “If your child is having a challenging day getting out the door for whatever reason on a particular Saturday, you’ve missed a whole month. So we said “open it up to make it far more accessible.” MyTime is now offered from 3:00 to 5:00 p.m. Tuesday through Friday for half-price admission.

“Play is a universal language like music,” Hilary said. “Play is a safe place. We’re here as a safe, neutral, warm and welcoming community resource. What we want is not just some of the kids but ALL of the kids to know this is their children’s museum—they belong here.”

The Drawing Studio



The mission statement of The Drawing Studio (TDS) is “to inspire people of all ages and backgrounds to embrace art practice as a pathway to personal growth and healthy community.” The realization of this mission is being advanced through the R.E.A.D.I. initiative which was launched in 2019. R.E.A.D.I. stands for Race, Equity, Access, Diversity, and Inclusion. The Drawing Studio is committed to creating a more equitable and inclusive art

community.

What funding from The David and Lura Lovell Foundation made possible is the ability to pay art instructors who were already serving marginalized communities. Program Director Anton Russell said, “The teaching artists had a fundamental problem—they need to be able to be paid for the work they’re doing. But they had a community-based model that was never set up to be able to pay them. The Drawing Studio was able to use the Lovell Foundation funding to actually build that infrastructure for them. And now,



through those partnerships with artists, not only have we been able to pay them directly, which we are doing, but we’ve also been able to show them a model for how they can use the same vehicles, including grant writing and identifying donors. This is a huge way for us to address equity for teaching art throughout the community.”

By paying the teaching artists, TDS provides art accessibility for all. There is no barrier to access to the programs provided by the paid teaching artists—the classes are free to marginalized communities, people who were previously excluded from the fee-based programs as they

existed at The Drawing Studio. Executive Director Emiel Brott talked about the challenges in moving forward to serve and integrate marginalized people as the R.E.A.D. I. program was implemented: “One of our goals is to try to have more integration between our long-standing students and R.E.A.D.I. BASTA! students, including women of color, recent immigrants, Spanish speakers, and those who are LGBTQ.”

“The dominant culture of TDS has been heterosexual, cisgender white, wealthy women,” Emiel continued. “We want people to stay with us and grow with us and develop an open, growth mindset. We’re walking with them, helping them to see their blind spots, helping them see their implicit bias, helping them see what their work is. I think everyone who’s here has the right heart. We just need to make sure we have the right vocabulary and start talking and sharing with one another.” The aim of TDS is to listen, learn, and grow alongside those with diverse backgrounds and perspectives rather than emphasize separation. Creative expression is a gift to connect different minds and backgrounds.

As just one example of serving people who previously could not access TDS classes, Anton talked about how TDS is now supporting classes for deaf people. “We had been showcasing that only able-bodied people can make art and have access to art. That was an obstacle to growth because there was no R.E.A.D. I. initiative in place to call those things forward as action steps. The change we’re noticing is that there’s now a possibility for us to look at our entire budget and say we need a line item that will pay for interpreters. We now have a deaf student we brought into our community. This student was able to be a part of teaching us as a staff how TDS can be better. Being more accessible for people who are deaf used to be an obstacle. And now it’s an opportunity.”

In addition to increasing access, R.E.A.D.I has challenged many conceptions of art, including the realization that everyone is educated by the same Western civilized mindset, and presenting the same Western civilized concept of what art is. TDS is now creating a supportive community for everyone in their art practice so they can create the art they want and show up in a way that helps our community thrive.



When Emiel and Anton came on board in 2020, they knew something had to change. The strategic plan of TDS was clear about pursuing diversity, but at that time the Board and staff did not know how to go about it. “We’ve challenged our business model to change from just earned revenue on classes,” said Emiel. “We had to think more expansively about funding partnerships, and who are the kinds of entities that

will be interested in helping to develop this vision that we have of being a truly inclusive community art center that is growing all the time.” Anton and Emiel are co-leaders of R.E.A.D.I., and the experience has led them to pursue a co-executive director model. They readily acknowledge they couldn’t have made the progress they have without each other.

Emiel said, “we have seen that we’re leading the way in IDEA implementation; indeed, people are coming to us constantly asking for tips on how to do what they’re doing better and to learn from us. One of the lasting impacts of this funding is that The Drawing Studio can continue to be at the forefront of systemic change in the nonprofit sector.”



Tucson Jewish Community Center

In May of 2018, Todd Rockoff, President and CEO of the Tucson Jewish Community Center (JCC or the J), heard a presentation about the national Safety, Respect and Equity Coalition that was created to serve the Jewish community in public spaces like the J. Todd immediately decided to sign on and get involved.

By 2020, IDEA issues had become an area of focus for the JCC Board, as demonstrated by the adoption of the Safety Respect and Equity (SRE) Network Standards created to make all Jewish workplaces and communal spaces safe, respectful and equitable for employees, members and clients. The IDEA grant from The David and Lura Lovell Foundation enabled the J to review anti-harassment and non-discrimination policies and reporting and response procedures for needed revisions and updates. Critical to success was making the policies more accessible and better communicated to employees on a regular basis.



In 2021, the JCC engaged Sacred Space to work with their staff and other Jewish organizations in Tucson to do a deep dive and policy review. Todd said, “We want to make sure that our policies are tied to our values. If we say we want a reporting structure, or that these are harmful behaviors, we named them and they are codified in our policy, as are all the other elements.”

The investment from the Lovell Foundation helped with planning, with hiring external consultants and with training. Todd said, “We trained our entire staff—all 300. Ultimately, we created a train-the-trainer program. We have four of our staff who can now do the training.”



“There have been some situations—because nobody is perfect—where things have been reported,” said Todd. “Now, we have a process to be able to ensure that those things are dealt with in a way that is fair, but also efficient. In one case, we had to revoke someone’s membership because of unacceptable behavior. Five years or six years ago, we might have just said, ‘please don’t do that.’ Our

board is fully supportive and it is now part of our culture to hold people accountable.”

The JCC hired its first Inclusion Coordinator in January of 2022. Todd said, “While the Lovell Foundation didn’t fund the position, the journey that the Lovell funding provided helped us identify that this was a need, and then we found other funding to pay for the employee for the first two years.”

“The Inclusion Coordinator is responsible for the training on diversity, equity, and inclusion,” Todd continued. “Every other week we have an inclusion learning moment. For example, we ask ourselves, ‘how can we hold multiple identities and what are the identities that one holds that could cause oppression, that create privilege? How do we become more aware of what they are?’”



“The ongoing development and enhancement of our culture has been profound,” said Todd. “The fact that this is out there in the ethos is and is reflected in our policies is transformational, because we are a transparent, open organization, where culture and employee experience matter.”

The JCC sees the results of what they are doing from participation in two important employee experience surveys. The JCC employee engagement score overall is 70%, which is in the upper 20% of JCCs in the study. Todd said, “It’s not about the score itself. It’s really the impact and experience that matter. So we spend a lot of time looking at the detailed results by department. The level of transparency that is essential for this process means that you share the data with your entire staff and your board.”

The J uses the platform of its work to take care of people of all ages and all abilities. To work with people with disabilities, which is challenging work, the staff must feel good about not just what they’re doing with the participant but the place in which they provide the service.

Todd said, “What I would hope is that we continue to earn the reputation as being a great place to work. And we continue to never be complacent about our work around culture, and that our employee retention or growth strategy for the individual continues to provide them with the highest level of opportunity. When we do go out to market to find people, we want to find people raising their hand saying I want to work there because it is known as a

great place to learn and grow. That's what we want. And if we do that, then what we're able to deliver to the community is at the very highest level possible."

Todd also commented on the broader role of the J in impacting antisemitism, which is on the rise: "I believe that organizations like the J are vital to combating antisemitism because we create an environment here that is rooted in Jewish values and welcomes people from the broader community into programming in our space, where there is real community building. Without an organization like the J, you create more barriers. And with an organization like the J, you create more bridges."