



## Appendix D: Equity Audit Resources

Resources are first listed by type, followed by an alphabetical list that also includes a brief description. Links to online sources are included where possible.

### Resources by Type

#### Basic Arguments for Funders to Engage in Racial Equity Work

GrantCraft, in partnership with the Philanthropic Initiative for Racial Equity, [Grant Making with a Racial Equity Lens](#), by Julie Quiroz-Martinez, 2007, 32 pages

#### Equity Audits

Arts and Science Council (Charlotte-Mecklenburg, North Carolina), [Cultural Equity Report 2020](#), edited by Krista Terrell, 34 pages

Edmonton (Alberta, Canada) Community Foundation, [Edmonton Community Foundation – Equity Audit: Assessing the community grants and student awards process and format through an equity lens](#), by CRC Consulting, Naheyawin and the Edmonton Pride Centre, April 2019, 14 pages

Sacramento Metropolitan Arts Commission, [Cultural Equity Audit: Observations and Recommendations](#), prepared by Margie J. Reese, MJR Partners, May 2019, 20 pages

#### Case Studies

Animating Democracy/Americans for the Arts, [Diving into Racial Equity: The MAP Fund's Exploration](#), by Vanessa Whang, November 2019, 28 pages

Annie E. Casey Foundation, [Advancing the Mission: Tools for Equity, Diversity, and Inclusion](#), produced by [JustPartners, Inc.](#), of Baltimore, Maryland, September 2009, 96 pages

Arts and Science Council (Charlotte-Mecklenburg, North Carolina), [Cultural Equity Report 2020](#), edited by Krista Terrell, 34 pages

## Diversity Efforts in Philanthropy

Center for Effective Philanthropy, [Nonprofit Diversity Efforts: Current Practices and the Role of Foundations](#), by Ellie Buteau, Jennifer Glickman, Matthew Leiwant and Temitayo Ilegbusi, 2018, 36 pages

United Philanthropy Forum, [Advancing Racial Equity in Philanthropy: A Scan of Philanthropy-Serving Organizations](#), by David Maurrasse, July 2018, 27 pages

## Participatory Grant Making

GrantCraft, a service of Foundation Center, [Deciding Together: Shifting Power and Resources through Participatory Grantmaking](#), by Cynthia Gibson, 2018, 61 pages

## Toolkits: Social Justice Focus

Building Bridges Initiative, [Effective Strategies for Organizations of Color in Philanthropy](#), by Building Bridges Initiative, [no date, but after 2019], 31 pages

Equity in the Center, a project of ProInspire, [Awake to Woke to Work: Building a Race Equity Culture](#), by the Equitable Evaluation Initiative, 2021, 36 pages

The National Center for Responsive Philanthropy, [Power Moves: Your Essential Philanthropy Assessment Guide for Equity and Justice](#), written by Lisa Ranghelli and Jennifer Choi with Dan Petegorsky, May 2018, 77 pages

## Toolkits: Internal Work

Ford Foundation, [Diversity, Inclusion and Equity Tools and Resources for Grantmakers](#), by various authors, [no date], various pages

Peak Grantmaking, [Tie Practice to Values: How to Reflect and Align Values with Practice](#), 2019, 9 pages

## Toolkits: Grant-Making Process

Arabella Advisors, [A Checklist of Potential Actions: Incorporating DEI into Your Grantmaking Process](#), [Date unknown], compiled by Nancy Chan and Pamela Fischer, 10 pages

Ford Foundation, [Diversity, Inclusion and Equity Tools and Resources for Grantmakers](#), by various authors, [no date], various pages

Nonprofit AF, [Equitable Grantmaking Continuum](#), by Vu Le, March 2021, 4 pages of blog, 5 pages of tool

Peak Grantmaking, [Drive Equity: How to Reduce Bias in Decision-Making and Grant Awards](#), 2020, 9 pages

Peak Grantmaking, [Drive Equity: How to Reduce Bias in Grantmaking Strategy, Community Outreach, and Applications](#), 2020, 9 pages

## Evaluation Practices and Equity

Grantmakers for Effective Organizations and Equitable Evaluation Initiative, [Shifting the Evaluation Paradigm: The Equitable Evaluation Framework](#), by the Equitable Evaluation Initiative, 2021, 42 pages

## Resources by Organization Name, with Summaries

- Animating Democracy/Americans for the Arts, [Diving into Racial Equity: The MAP Fund's Exploration](#), by Vanessa Whang, November 2019, 28 pages

A case study of The MAP Fund's process of examining its work with a racial equity lens, beginning in 2014. It looks at how The MAP Fund restructured its applications, how it engaged with allies in the field, developed a new framework for what attributes constituted excellence in arts for change, and deeply incorporated the Aesthetic Perspectives framework into the 2018 application and adjudication processes. On page 19, "MAP's Characterizations of Bias in Grant Review" provides a succinct discussion about bias in the review process.

- Annie E. Casey Foundation, [Advancing the Mission: Tools for Equity, Diversity, and Inclusion](#), produced by [JustPartners, Inc.](#) of Baltimore, Maryland, September 2009, 96 pages

This is a very robust resource with a lot of tools that take on different aspects of EDI work at a grant-making organization. Some tools take the form of self-assessments. The Cross-Cutting Tools raise issues about an organization's overall climate or are about topics that are relevant across functional areas. The Hard Wiring section provides guidance to ensure that this work is in-depth and sticky, by showing how structures and processes can be

revised. It also includes a summary of how the Casey Foundation's EDI work began and has developed over the years.

- Arabella Advisors, [A Checklist of Potential Actions: Incorporating DEI in Your Grant-making Process](#), [Date unknown], compiled by Nancy Chan and Pamela Fischer, 10 pages

This checklist provides ideas on how to incorporate DEI into grant-making processes. It is organized by different aspects of the grant-making process (e.g., outreach, application process, grant-making strategy). It is not an exhaustive list, but rather a place to start as grant-making organizations look for ideas on areas of work and ideas on what can be done to increase equity.

- Arts and Science Council (Charlotte-Mecklenburg, North Carolina), [Cultural Equity Report 2020](#), edited by Krista Terrell, 34 pages

This report frankly and honestly confronts the organization's history of inequitable practices. In the introduction the Arts and Science Council "apologize[s] and accept[s] accountability for the role we have played in creating and perpetuating systems and structures that have exacerbated inequities in our cultural community and beyond." It shares a list of accomplishments since the Task Force issued its recommendations and a list of items "in progress" during the current fiscal year.

- Building Bridges Initiative, [Effective Strategies for Organizations of Color in Philanthropy](#), by Building Bridges Initiative, [no date, but after 2019], 31 pages

This toolkit is unusual in that it addresses issues from the organizational leader perspective, specifically leaders of color. It provides a brief overview of many of the long-standing systemic issues found in philanthropy and provides some advice to address those inequities. There is a reference list with further reading suggestions.

- Center for Effective Philanthropy, [Nonprofit Diversity Efforts: Current Practices and the Role of Foundations](#), by Ellie Buteau, Jennifer Glickman, Matthew Leiwant and Temitayo Ilegbusi, 2018, 36 pages

This report explores how nonprofit organizations are thinking about diversity and how funders are interacting with and/or supporting those efforts. CEP surveyed organization leaders about their diversity efforts, demographic information collected, and how foundations were and could be supportive of these efforts. It is interesting, but not necessarily surprising, to see that race/ethnicity data is requested almost universally, but other demographic data such as gender identity, disability and sexual orientation are not.

- Edmonton (Alberta, Canada) Community Foundation, [Edmonton Community Foundation – Equity Audit: Assessing the community grants and student awards process and format through an equity lens](#), by CRC Consulting, Naheyawin, and the Edmonton Pride Centre, April 2019, 14 pages

This equity audit tool is intended to help identify current strengths within the granting and awards streams at the Edmonton Community Foundation, as well as areas for improvement. This tool has two sections: an audit by staff and an audit by community members. This tool takes a practical, pragmatic approach that is specific to the foundation.

- Equity in the Center, a project of ProInspire, [Awake to Woke to Work: Building a Race Equity Culture](#), by the Equitable Evaluation Initiative, 2021, 36 pages

This report examines how organizations can build a race equity culture, the foundational work for organizations seeking to advance race equity. Perhaps the most practical aspect is the organizational levers in the Race Equity Cycle, which chart out characteristics and actions at the "awake," "woke" and "work" levels. It includes an extensive bibliography and end notes.

- Ford Foundation, [Diversity, Inclusion and Equity Tools and Resources for Grantmakers](#), by various authors, [no date], various pages

This document provides succinct overviews of DEI issues for grant makers. The case studies and facilitator guide are helpful and easy-to-use tools for those facilitating conversations.

- GrantCraft, a service of Foundation Center, [Deciding Together: Shifting Power and Resources through Participatory Grantmaking](#), by Cynthia Gibson, 2018, 61 pages

This is a potentially useful resource for anyone considering a participatory grant-making structure. It looks at both the why and the how of shifting decision-making power to the communities impacted by funding decisions. Through examples and insights from different grant makers, it explores the benefits, challenges and models of participatory grant making.

- GrantCraft in partnership with the Philanthropic Initiative for Racial Equity, [Grant Making with a Racial Equity Lens](#), by Julie Quiroz-Martinez, 2007, 32 pages

This resource concentrates on laying the foundation for why racial equity in funding matters and why it would benefit grant makers to examine their work through a racial

equity lens. It could be useful as a tool for those who need arguments for beginning this work.

- Grantmakers for Effective Organizations and Equitable Evaluation Initiative, [Shifting the Evaluation Paradigm: The Equitable Evaluation Framework](#), by the Equitable Evaluation Initiative, 2021, 42 pages

In general, this is a deep dive into how to approach equity evaluations. It concentrates on larger conceptual ideas and equitable evaluation as "a reflective and reflexive practice" and explicitly states "there are no checklists, tool kits or sets of instructions." It might be useful for evaluation works, but does not offer any practical applications.

- The National Center for Responsive Philanthropy, [Power Moves: Your Essential Philanthropy Assessment Guide for Equity and Justice](#), written by Lisa Rangelhelli and Jennifer Choi with Dan Petegorsky, May 2018, 77 pages

This set of self-assessment resources supports funders' equity work by exploring the concept of power and how it can be built, shared and wielded. The "Tools You Can Use" section includes a glossary of relevant terms, readiness assessment, sample assessment time line and process, tips on gathering feedback, and next steps worksheet.

- Nonprofit AF, [Equitable Grantmaking Continuum](#), By Vu Le, March 2021, 4 pages of blog post, 5 pages of tool

This continuum is a self-assessment tool that examines different components of the grant-making process. It is based on the author's experience working with grassroots organizations led by and serving marginalized communities. This is a very simple and direct tool that allows for quick self-assessment that can serve as a conversation starter for grant makers.

- Peak Grantmaking, [Drive Equity: How to Reduce Bias in Decision-Making and Grants Awards](#), 2020, 9 pages

This is part of a series intended to help grants management professionals understand and reduce the impact of unconscious bias. This particular guide is focused on the decision-making and award-management processes.

- Peak Grantmaking, [Drive Equity: How to Reduce Bias in Grantmaking Strategy, Community Outreach, and Applications](#), 2020, 9 pages

This is part of a series intended to help grants management professionals understand and reduce the impact of unconscious bias. This particular guide is focused on grant-making strategy development, community outreach, applications and the application process.

- Peak Grantmaking, [Tie Practice to Values: How to Reflect and Align Values with Practice](#), 2019, 9 pages

This guide supports grant-making organizations looking to go through a self-evaluation process. It is structured to support facilitated group conversations among staff as they reflect on their values and alignment of those values with practice.

- Sacramento Metropolitan Arts Commission, [Cultural Equity Audit: Observations and Recommendations](#), prepared by Margie J. Reese, MJR Partners, May 2019, 20 pages

This equity audit reviewed the programs, policies, structures, practices and culture of the current work and workplace of the arts commission. The purpose of this audit was to review the agency's current effectiveness and make recommendations for improvements in matters related to diversity, equity and access; the newly adopted arts and culture plan; and future performance through the lens of equity and inclusion.

- United Philanthropy Forum, [Advancing Racial Equity in Philanthropy: A Scan of Philanthropy-Serving Organizations](#), by David Maurrasse, July 2018, 27 pages

This is a fieldwide view of how philanthropy-serving organizations and foundations are thinking about racial equity in philanthropy. It is based on a scan of philanthropy-serving organizations, which included both a survey and in-depth interviews.