Inclusive Economies Grantee Convening

Summary Report

January 27-29, 2020
Austin, TX

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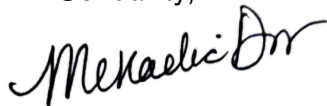
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A Note to Our Grantee Partners

Dear Grantee Partner,

Thank you for your deep commitment to this work of building an inclusive economy. Thank you for your willingness to engage in difficult conversations with us and with each other. Thank you for the energy, insight, and vision you brought to the Inclusive Economies Grantee Convening. It was a pleasure sharing space together and learning from you all.

It has been a little over a year since the Inclusive Economies (IE) Team launched its refined program strategy, focusing on two core strategies: Business Start-Up and Growth and Equitable Economic Development. We continue to learn and refine our processes to be the best funder partner we can be to all of you. We tried something new with this convening – bringing together grantee partners across our portfolio and across strategies. Our grantee partners reflect an array of approaches to creating an inclusive economy and bring unique insights into advancing this shared vision. We were excited to provide a space for everyone to connect with and learn from each other.

I'm a firm believer that change happens at the speed of trust. Part of our intention in hosting this convening was to create space for grantee partners to build trust with each other and with Surdna. I am deeply appreciative of the openness, critical thinking, and realness that you all held throughout the entire experience. It was amazing to feel the energy and commitment you all bring to this work. On behalf of the entire IE Team, thank you for your trust in us and in each other.

In Solidarity,

Mekaelia Davis, IE Program Director

From left to right: Mekaelia Davis, Omar Suarez, Patrice Green, Jeff Jiménez-Kurlander

Reflections

"I really enjoyed hearing about all of the grantees' work, how they wrestle with the best way to reach their objectives and the desire to collaborate with mission-aligned grantees. The **passion and energy in the room was exciting** and the convening was free from any sense of competition...."

"It was great to talk to the grantees in the Labor Standards breakout on Day 3; I knew many of them, and it's **always great to hear their brilliance** and be able to bounce ideas off of one another."

"I know now that Surdna is **intentional and willing to have tough conversations** internally to be more beneficial externally."

"...**Surdna has an important role to play** in bringing other philanthropies to the table with regard to building inclusive economies."

"I learned so much about how advocacy groups, media groups and other organizations that are all creating a more equitable and inclusive future. It's **truly remarkable to be a part of this larger mission**."

"Opportunities to share with funders and other grantees are rare and extremely important for creating networks, allowing for **deep learning opportunities**, and connecting the work across time and place."

Program Summary

The Surdna Inclusive Economies (IE) Grantee Convening took place January 27-29, 2020 in Austin, Texas. The 74 grantee partners in attendance represented 52 organizations across IE's two core strategies: Business Start-Up and Growth and Equitable Economic Development. Participants spanned the full spectrum of the IE portfolio. Given the breadth of work that the IE Program supports, the IE Grantee Convening was designed to meet the following objectives:

1. Facilitate a collaborative learning environment where grantees partners can connect with each other, share challenges, and discuss lessons learned in their work;

2. Share with grantee partners about the lessons Surdna learned and insights the team has gained since the launching the revised IE program;

3. Learn from grantees about the pressing issues they face in deploying their strategies;

4. Explore ways to use metrics and grantee-learning to inform the field (including policy makers, other funders, communities, and target audiences); and understand how grantees would like to see funders use metrics.

Monday, January 27 – Tuesday, January 28 (Days 1 and 2)

The three-day convening opened with an evening reception and dinner, which included remarks by Surdna President, Don Chen, Surdna Board Member and IE Program Committee Chair, Tim Thorpe, and IE Program Director, Mekaelia Davis. The reception was a time for grantees to relax, connect with each beyond their work, and recognize each other's humanity before diving into a full day and half of programming.

Don and Mekaelia kicked off Day 2 of the convening – Mekaelia grounding the room in the history of the United States' racist economic structure, and Don reflecting on how storytelling is fundamental to the way people understand and think about the economy.

Following Don and Mekaelia's opening remarks, Patrice Green, IE Program Officer, and Jonathan Goldberg, Surdna's Director of Learning and Grant Operations, joined Mekaelia to reflect on and discuss lessons learned during the first year of the revised IE program strategy. Jon shared background on Surdna's commitment to being a learning organization and the steps the Foundation is taking to explore new ways of learning from its grantee partners. Mekaelia and Patrice reinforced IE's dedication to authentically engaging with grantee partners and seeding new models for advancing an inclusive economy.

From left to right: Don Chen, Mekaelia Davis

Then, Cecilia Estolano, CEO of urban planning and public policy consulting firm, Estolano Advisors, and emcee throughout the convening, delivered an afternoon presentation on highlights and findings from the IE Learning Survey that was completed in Summer 2019 by 45 grantee partners. The Learning Survey objectives were to identify and understand the ways that grantees use metrics and data collection to inform and asses their work, as well as gather feedback on IE's beta program metrics. In the discussion following the survey presentation, participants surfaced the need for clear, accessible definitions for terms being used and the importance of using more precise language, for example using "equity-committed" vs. "equity-minded."

Day 2 continued with a panel conversation on the power of narratives and storytelling to drive change towards a more just and inclusive economy. The panel featured three IE grantee partners: Lucas Grindley, Executive Director of Next City, Wendi C. Thomas, Editor and Founder of MLK50: Justice Through Journalism, and Zenobia Jeffries Warfield, Executive Editor of YES! Media.

In the first breakout session of the convening, grantee partners moved into small breakout groups and were asked to wrestle with two big ideas: (1) Narrative Change and Movement Building and (2) Measuring Advocacy Efforts.

Day 2 ended with a social outing, organized by Omar Suarez, National Urban Fellow with the IE program. At Azul Tequila, a local, Latino-owned business, grantee partners were able to network with each other over delicious food, as well as enjoy a virtual reality demonstration provided by Black and Brown students with the local nonprofit, E4 Youth.[i]

Wednesday, January 29 (Day 3)

The majority of Day 3 consisted of breakout sessions that gave grantee partners the opportunity to learn with each other within and across strategy areas. During Breakout Session 2, folks self-selected into one of three facilitated discussions: (1) Creating Wealth Through Entrepreneurship, (2) Developing Equitable Economic Policies, and (3) Labor in the 21st Century. Each group's discussion questions were generated based on takeaways from the IE Team's ongoing formal and informal conversations with many grantee partners. In Breakout Session 3, folks split into two large groups organized by strategy area. In each group, grantee partners discussed the ways they would like to see funders support grantee partners in meaningful data collection, as well as some strategies for how grantees could use the collected data to amplify their impact.

Throughout the activities and discussions, the major recurring theme was the desire to work together to identify shared values and create unique visions for what it means to become an inclusive economy. Participants also underscored the need for greater collaboration with each other and called on funders, including Surdna, to increase their support for spaces, big and small, that bring organizations together from across the inclusive economies field to learn from and collaborate with each other.

The convening ended with a full-group debrief where participants reflected on the time spent together. Grantee partners applauded Surdna for the convening's uniqueness in bringing together so many talented leaders of color into one space. Participants also expressed gratitude for the many new connections forged at the convening. They highlighted the importance of seeing the breadth of IE's work and how IE's wide array of grantee partners relate to each other. The convening closed with a shared desire amongst grantee partners to continue on this learning journey with Surdna and the IE Team.

Learnings and Takeaways

The three-day convening was filled with panels, presentations, breakout sessions, and networking opportunities. Grantee partners made new relationships; explored opportunities to collaborate with each other to advance their work; found new sources of data to support their work; learned new ways to tackle persistent challenges; and witnessed the collective power of this ecosystem of partners. The following sections highlight key takeaways and ideas raised throughout the convening.

Panel Discussion: Power of Compelling Narratives

YES!'s Banking on Justice report profiled a small government financing program that helped build Mississippi residents' wealth. The report was picked up by two national credit union and community banks associations that then encouraged their members to adopt the featured program, **paving the way for thousands of people to find their way out of poverty.**

Poverty is robbery and the thieves can be named. MLK50's work focuses on **elevating the lived experiences of those who have been robbed** and exposing those who are profiting from others' vulnerability.

From left to right: Zenobia Jeffries Warfield (YES! Media), Wendi Thomas (MLK50: Justice Through Journalism)

Poverty is robbery and the thieves can be named. The panel opened with this poignant remark from Wendi Thomas of MLK 50. She shared about MLK50's 2019 series *Profiting from the Poor,* which exposed Methodist Le Bonheur Healthcare, a nonprofit hospital associated with the United Methodist Church, for using "the court system and its in-house collection agency to go after poor patients for hospital bills...[filing] more than 8,300 lawsuits between 2014 and 2018, even taking its own low-wage employees to court and garnishing their pay."[ii] In its coverage, MLK50 centered the stories of Black women who experienced these injustices. The publication's investigative reporting resulted in the hospital "erasing the debts of more than 6,500 patients it had sued for medical bills."[iii]

Lucas Grindley, Executive Director of Next City, shared lessons learned from the LGBT movement's campaign for marriage equality, highlighting how the movement transformed a losing narrative focused on marriage equality's legal benefits into people-oriented messaging. He noted how the new messaging that focused on our collective humanity led to wins in multiple states.

> An effective narrative **tells a story of values and emotion**, not necessarily details. It is important to say something different from what others are saying.

Lucas Grindley (Next City)

Each panelist emphasized that centering people in a narrative is the key to telling a good story. Wendi encouraged organizations to consider key questions for crafting a compelling narrative: Are there new characters in the story you want to tell? Are there new villains? Is there something new that people can learn? Lucas noted that solutions-oriented journalism is a way for readers to have a greater feeling of agency. These types of stories generate interest, increase a reader's perceived knowledge, and increase the likelihood that a reader would support and/or share with others about a cause.

Panelists offered helpful tips and insights for organizations to keep in mind when reaching out to media outlets. They noted that the shrinking number of journalists and reporters in media makes it increasingly difficult to get a particular story covered by an outlet. The panel also mentioned that because social media sites are rapidly changing the rules for how information flows across their platforms, organizations could be cut off from the people that follow them. As a result, email communication is coming back in vogue as it allows organizations to be directly connected to people rather than relying on a third-party platform.

Breakout Session 1, Part A: Narrative Change and Movement Building

Split into four discussion groups, participants worked to identify the infrastructure and tools needed to utilize data and stories in shifting narratives. The following themes emerged during these discussions:

Shared Vision, Values, and Narrative

In order to craft a unified narrative, IE grantee partners need to collectively identify their shared values and create a cohesive vision for the future. They raised the need for organizations to collaborate in ways that amplify each other's work and puts forth a clear, unified message and vision. Participants also noted the need for storytelling and narrative work to be tied to organizing work and raised the importance of crafting narratives with communities so that people see themselves in the stories.

Tools and Skills for Narrative Building

Nonprofits lack access to the digital tools and resources that the private sector utilizes for storytelling and sharing information. In addition, staff may not have the skillsets needed to most effectively use these tools. Participants highlighted the need for more skill-building opportunities for team members to sharpen their storytelling and narrative crafting abilities. Participants elevated that narrative work needs to be made a priority. Naming it as a priority allows time, money, and other resources to be shifted towards this work.

Challenges in Creating a Message

Creating the right messaging is challenging for a few reasons. It is often difficult for organizations to appeal to a broader audience and bring in new supporters without watering down their message or compromising values. In some cases, such as in job quality advocacy, grantee partners are competing with the private sector's compelling messaging. Participants also identified a need for increased investment in message testing with different key audiences in order to find the best way to connect with different people.

Breakout Session 1, Part B: Measuring Advocacy Efforts

Acknowledging that we work in a field and a society that are increasingly reliant on data and metrics to ascertain and prove success, grantee partners examined ways to better measure the impact and outcomes related to organizing, advocacy, and ecosystem building work. During these discussions, participants lifted up the following key themes:

Tensions in Data Collection Practices

Data currently being used to measure an organization's success are missing the point and can be laborious/extractive for communities to collect. Often times, there are tensions between different groups in the ecosystem – those that collect and report on data (e.g. Economic Policy Institute, Aspen Institute) and frontline groups working with communities (e.g. Texas Organizing Project, NDN Collective). Identifying data collection priorities should be a collaborative effort between research institutions and community organizations that centers the knowledge of frontline organizations and grassroots groups, in particular the voices and expertise of Black people.

Developing Metrics and Benchmarks

Participants noted that successful advocacy activities can be "measured" in a variety of ways. Measuring outcomes like increased community power is a more complex and nuanced endeavor than measuring the number of policies passed or jobs created. Expanding on the identified need for crafting a shared vision, participants discussed the need for developing flexible benchmarks around that vision and tools that measure impact from different segments of the field. Grantee partners also noted that, oftentimes, it is difficult to attribute a win to the work of a single organization, so it is important to employ a standard of contribution over attribution when evaluating the link between advocacy efforts and results.

Supporting POC Leadership

It is critical to develop the leadership abilities of people of color (POC) and to measure long-term power building. Often times, POC-led work that focuses on specific communities of color facing key issues is not funded adequately. Knowing that leaders of color face many institutional challenges, funders need to be intentional about supporting these leaders' development and leveraging their power.

Breakout Session 2: Creating Wealth Through Entrepreneurship

In this breakout group, participants worked together to answer three questions:

1. What are innovative financial products, tested curricula, or other programming strategies that have effectively supported high-growth entrepreneurs of color?

2. What reforms in public policy would be most helpful in supporting the growth of POC-owned firms?

3. How can/does individual wealth creation through entrepreneurship translate into community wealth building?

The sections below outline examples, resources, and ideas generated during the discussion.

Innovative Financial Products, Effective Curricula and Programs

Products and programs that stood out as innovative and effective included:

1. Responsible Business Lending Coalition – Small Business Borrower's Bill of Rights

2. XXcelerate Loan Program

3. Ohio Third Frontier Program – numerous loan funds and JobsOhio Network Program

4. Cincinnati Black Founders Network

5. Mississippi Self-Employment Assistance Program

Public Policy Reforms to Support Growth of POC-Owned Firms

Folks highlighted state programs designed to increase access to capital for small businesses owners. The California Capital Access Program (CalCAP), established in 1994, "is a loan loss reserve program which may provide up to 100% coverage on losses as a result of certain loan defaults."[iv] Oregon House Bill 4033, yet to be approved by the Oregon House of Representatives, would "establish a 'community lender loan loss account program, designed with input from the kinds of lenders that already reach women- and minority-owned businesses.'"[v] The Ohio Third Frontier Entrepreneurial Service Provider program has enabled the state to invest comprehensively in regional ecosystems to bolster capital, talent,

and services. Surdna grantee Hillman Accelerator has leveraged this support for underrepresented tech start-ups in Cincinnati.

Participants also expressed desire to see more streamlined certification processes for business owners at each level of government (local, regional, state), as well as increased innovation and diverse leadership in local chambers of commerce.

Translating Individual Wealth Creation into Community Wealth Building

Similar to other discussions that took place during the convening, participants reinforced the need to create shared values. There was also interest in having common definitions for community wealth, which participants noted could encompass a variety of issues that are financial, social, cultural, or spiritual in nature. The team at Scale Up Milwaukee, for example, has designed the Rising Tide program which provide tools, knowledge, and networks that support communities of color to build generational wealth. The program identifies high-value activities and behaviors closely linked to creation, protection, growth, and transmission of generational wealth to be mapped to a Generational Wealth Continuum. Grantee partners also identified that collective ownership is central to building community wealth. In addition, participants raised that communities need to have strong relationships with anchor institutions, real estate developers, and elected officials in order to hold on to space and place - which are increasingly vulnerable.

Breakout Session 2: Developing Equitable Economic Policies

In this discussion group, participants worked together to identify legislative tools, policy changes, and training that would help increase transparency and community participation in economic development. The sections below convey the ideas participants generated.

Legislative Tools to Position Communities for Greater Democratic Participation in Economic Development

Numerous participants highlighted that banning cities from providing tax incentives would be a pivotal policy change for many communities. Aligned with this is eliminating state preemption laws that prohibit local jurisdictions from making progressive change. Participants raised the need for decision-makers to better understand the critical link between equity and economic growth. Several participants lifted up community benefits agreements (CBAs) as an important tool for building community assets and community ownership models. These participants also expressed a desire to see CBAs become standard practice for public investments.

Equity-Focused Training and Curricula for Building Community Capacity to Engage in Policy Development

A key idea that emerged during this session was the need for increased collaboration and shared learning amongst folks doing work on the ground. Sharing best practices and lessons learned from collective actions in different communities and regions helps strengthen the movement. This includes investing in capacity building for organizations and communities so that they can engage in state budget and federal tax structure discussions.

Similar to earlier discussions around narrative change, folks highlighted the importance of breaking silos and creating a complete narrative that shows how discrete policy issues contribute to creating a healthy democracy. Creating a powerful and relatable message, such as "Who Decides?" can help make policy discussions more accessible to community members.

Policies to Increase Accountability in the Economic Development Field

For many participants, increasing accountability in the economic development field is tied to increasing public sector transparency and increasing community input into and control of economic development processes. Policy suggestions to increase accountability included:

1. Create legal compliance mechanisms attached to **community visioning processes** (e.g. institutionalizing CBAs);

2. **Participatory budgeting**;

3. Fund municipalities to conduct annual **public audits of tax incentive impacts**;

4. Form **citizen review boards for tax incentives**;

5. **Reform Community Reinvestment Act** to include more enforcement mechanisms and oversight;

6. **Remove education funding's tie to property taxes** because research shows that investment in pre-K through 12 education is one of the top two economic development measures with the highest return on investment.

Participants also raised the need to develop clear policy goals and more sophisticated indicators with values embedded into them. In addition, grantee partners expressed a desire to see a resource that compiles the details and outcomes of effective community-led organizing efforts.

Some resources group members noted included:

1. Baltimore's Equity Assessment Program (Ordinance)

2. Washington D.C.'s Inclusive Prosperity Dashboard

3. Prosperity Now's Scorecard and EITC Awareness Day Toolkit

Breakout Session 2: Labor in the 21ˢᵗ Century

This discussion group weighed in on three big questions:

1. What tensions exist between creating quality jobs and supporting the growth of POC-owned firms and how can we navigate them?

2. What are the most pressing public and private sector policy reforms necessary to increase job quality for the most vulnerable workers?

3. What pressing issues should economic development practitioners be dialed into in order to build a progressive, "21st century labor movement" (e.g. automation, youth workforce, etc.)?

Participants shared their experiences in the labor movement, as well as effective strategies and tactics for their work.

Tensions between Creating Quality Jobs and Supporting Growth of POC-Owned Firms

Group members expressed a desire to see quality job standards be the norm for all jobs, not just union jobs. They noted the nonprofit sector is no exception – many nonprofit organizations are having to do more with fewer resources, which affects how nonprofit employees are compensated. Funders should adequately fund nonprofit grantees with the explicit understanding that they are providing quality jobs to their employees. In the private sector, business owners of color face significant barriers to accessing the capital needed to sustain profitable business operations and create good quality jobs that provide employees with health insurance, living wages, and other benefits.

Public + Private Sector Policy Reforms to Increase Job Quality for Vulnerable Workers

Participants uplifted many priorities for policy changes that build worker power and strengthen our democracy. Participants referenced the Protecting the Right to Organize Act (PRO Act), recently passed by the U.S. House of Representatives, "would make it substantially easier for workers to form and join unions and for those unions to negotiate meaningful contracts with employers."[vi] In addition, the Clean Slate for Worker Power report recently released by the Harvard Law School's Labor and Worklife Program outlined a series of comprehensive recommendations for rewriting U.S. labor laws. The report's

recommendations ranged from expanding labor law to include long-excluded employment categories, such as domestic, agricultural, undocumented, and incarcerated workers and workers with disabilities to creating "incentives and mandates for employers to participate in worker-driven standards-setting and enforcement programs through licensing and permitting authority."[vii] Additional policy reforms participants elevated as priorities were:

1. Universal access to childcare
2. Strong minimum wage that includes tipped workers
3. Wage theft protections
4. Paid sick leave
5. Paid family leave
6. Ability for workers to collectively bargain
7. Protecting right to protest / strike
8. Anti-retaliation protections
9. Healthy and safe working conditions / worker's compensation
10. Community oversight for worker standards
11. Protecting worker centers

Pressing Issues to Address in Building a Progressive 21st Century Labor Movement

Participants discussed the need to address issues that are typically considered to be outside the realm of labor policy, but are extremely relevant to building worker power, especially for the most disadvantaged workers. Issues and policy solutions raised included:

1. Universal access to childcare
2. Social insurance
3. Guaranteed income
4. Universal healthcare
5. Protections for immigrant and undocumented workers
6. Forced migration due to displacement from gentrification, climate change, etc.

Other suggestions to strengthen the progressive labor movement included:

1. **Building solidarity** between blue states and coordinating movement strategies
2. Increased collaboration between nonprofit labor organizations beyond fundraising to **strategizing and building power together**
3. Creating a **unified narrative** around realizing a true democracy
4. Directing **resources to where there are the starkest inequities** regardless of blue/red states
5. **Resourcing movement leaders** to maintain momentum during critical moments

Breakout Session 3: Ways for Funders to Support Grantees

The final convening breakout split grantee partners into two large groups for discussions focused on the role that Surdna (and the broader philanthropic community) can play in supporting grantees with collecting meaningful data that help inform and assess their impact. Participants also weighed in on what they would like to see Surdna and other funders do with the grantee-reported data they collect. Key themes that emerged from these discussions were: (1) the need for Surdna to identify and facilitate intentional connections between grantee organizations; (2) the need to share data and data collection resources; and (3) the role Surdna can play in educating peer funders.

## Identify and Facilitate Intentional Connections between Organizations

Grantees are curious about each other and they want to be connected! Participants shared that the convening was a good start to learning about the work their peers in the field are engaged in, and Surdna's next step should be to facilitate matchmaking amongst organizations. **Surdna and other funders can help foster connections between grantees based on their work and interests by supporting peer mentoring, learning exchanges, webinars, and other collective learning experiences**.

Given the constellation of work being done among IE grantee partners, participants noted it would be worthwhile to **create a compendium of metrics and indicators that partners are using and to create a matrix or map that captures the spectrum of work being done across the IE grantmaking portfolio** from labor research and policy advocacy to entrepreneur development.

Invest in Sharing and Aligning Data and Data Collection Resources

Participants expressed that data collection and building data infrastructure poses a burden on many organizations. They stressed that because not every organization has the capacity to do their own data tracking, sharing amongst each other the data and metrics that work is crucial. Discussion members saw the opportunity for IE to play a role in compiling and sharing data and findings across their portfolio and serve as an information hub. Participants also expressed a desire for increased help in communicating data and crafting compelling narratives to influence change.

As in previous discussions, the need for developing a shared set of values and vision continued to arise. Folks also raised the importance of **building shared metrics to measure progress,** as well as determining a **shared vocabulary and definitions**. Partners expressed wanting to see **"people-centered research" that takes an intersectional approach to understanding folks' whole and complex identities**.
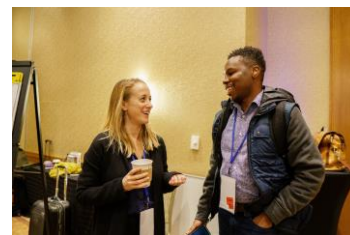
Engage and Educate Peer Funders

Frequently and consistently, participants acknowledged deep respect for and trust in the IE Team. They also acknowledged that **Surdna is the gold standard of what it means to be an engaged funder partner**. Given that, IE has an important role to play in educating its peer funders and bringing them along in the work of truly building an inclusive economy. Grantees suggested IE create learning cohorts or mentorship groups for grantees interested in learning how to better engage funders and communicate effectively with them. They expressed challenges in reaching progressive funders and would like Surdna to help facilitate those connections.

Some participants raised concerns about the "scarcity framework" in which philanthropy operates and its misalignment with the field's desire to create collective impact. **Grantee partners are under-resourced and need to see a more coordinated effort from the philanthropic community to support collaboration amongst grantee organizations**. This support could look like funders jointly convening their shared grantee partners or funding collaborative projects that leverage organizations' unique strengths and capacities (e.g. research, communications, coalition-building) to advance collective priorities. Grantee partners also suggested that Surdna be a leader on "abundance thinking" and help other funders flip their framing to an abundance framework.

Making Connections

Throughout the convening, participants interacted with each other through collaborative posters – brainstorming ideas for addressing shared challenges to data collection and sharing their favorite resources with each other. The following captures what folks shared on the posters.

Helpful Resources for Clients / Members / Stakeholders

1. Frameworks Institute – FrameLab Training
2. Peer to Peer Discussions
3. Governance Trainings
4. National and State Convenings
5. Connections to Decision-Makers and Gatekeepers
6. Model Legislation for/from Cities
7. Legislative Toolkits
8. Webinars/calls

Favorite Events and Conferences

1. Center for Media and Social Impact: Story Movements
2. Common Future + other Partners: Community Capital Conference (COCAP)
3. Jobs with Justice: National Conference
4. National Education Association: Conference on Racial & Social Justice
5. PolicyLink: Equity Summit
6. The Funders' Network (TFN): TFN Annual Conference
7. Zebras Unite: DazzleCamp

Favorite Podcasts, Books, and Other Media

Books

1. Decolonizing Wealth: Indigenous Wisdom to Heal Divides and Restore Balance by Edgar Villanueva
2. Democracy in Chains by Nancy MacLean
3. Emergent Strategy by Adrienne Marie Brown
4. How to Be an Anti-Racist by Ibram X. Kendi
5. Parable of the Sower by Octavia Butler
6. Real Impact: The New Economics of Social Change by Morgan Simon
7. The Color of Law by Richard Rothstein
8. The Value of Everything by Mariana Mazzucato
9. The Warmth of Other Suns by Isabel Wilkerson
10. White Fragility by Robin DiAngelo
11. White Rage by Carol Anderson

Podcasts

1. On Being with Krista Tippett (Public Radio Exchange)
2. On the Media (WNYC Studios)
3. Still Processing (The New York Times)
4. There Goes the Neighborhood (WNYC Studios)

Websites and Blogs

1. Harvard Business Review
2. MLK50.com
3. Next City
4. On Labor

Other Media

1. State of Working America (Economic Policy Institute)
2. On Labor Blog
3. The Great Hack (Netflix)

Conclusion

The IE grantee convening generated a robust set of ideas and surfaced a wide array of practical actions and tools for reimagining and the U.S. economy. Over the next year, the IE team's priorities include working closely with grantee partners and leaders across the field to align these ideas with grantmaking strategies. These strategies require a grantmaking approach that can confront the systems of power that hamstring economic inclusion, racial equity, and more democratic and regenerative economies.

The insights and lessons shared at the convening and in this report are being used to develop and adopt these preliminary philanthropic approaches to building more inclusive economies:

1. **Redefining the risk paradigm**. Whether supporting entrepreneurs of color or advancing more equitable economic development policies and practices, IE grantee partners shared consistent feedback about philanthropy's risk-averse approach to grantmaking. The longstanding fractures in our economy require both bold and savvy strategies that can feel uncomfortable to grant-makers because they challenge the markets and structures that enable the existence of grantmaking institutions. In our current economic system, philanthropic capital represents some of the most flexible resources that are critical to direct towards undoing entrenched systemic barriers in our market-based economy.

2. **Balancing the urgent with the long view**. No one can solve every problem. However, philanthropy can find ways to address present needs while making grants that proactively address long-term, systemic issues. This approach requires collaboration with other funders and the ability to deploy resources in ways that position grantees for sustained impact.

3. **Creating space for leaders to be human**. Research, analysis, advocacy, movement building, and messaging are necessary skills for building an inclusive economy. However, the convening made clear that philanthropy should consider the capacity building that grantees need to be successful. Grantees who are working to build more inclusive economies juggle a range of demanding relationships, systems, and stakeholders. Philanthropic approaches should consider grantmaking that supports grantees' well-being as a necessary capacity to navigate the dynamic and challenging work of building a more inclusive and just economy.

Next Steps

The passion, energy, and commitment to learning and collaboration that participants displayed throughout the convening was remarkable and exciting. At the end of the convening, it was clear that grantee partners wanted more – more spaces to connect with and learn from each other and with Surdna. In line with Surdna's commitment to organizational learning, the IE Team announced that they will be creating learning cohorts that will build on the conversations started during the convening.

Grantee partners also suggested additional ways that they would like to see conversations continue and deepen. These included:

1. Formalizing continued engagement beyond the convening
2. Supporting collaborative convenings that bring together grantees shared across funder portfolios
3. Creating a platform for interaction amongst Surdna and other grantees, where folks can share information and ask questions
4. Coordinating and advancing strategic communications support
5. Developing a shared vocabulary for the field
6. Identifying shared values and crafting a shared vision for this ecosystem

Acknowledgements

We are deeply appreciative of the work of our program partners in making this convening a success. Thank you to Estolano Advisors for your deep commitment to helping us realize our vision for this convening and designing a truly fulfilling experience. Thank you to our expert facilitators from ThirdSpace Action Lab and CoraJus. Thank you to our event logistics team at Glow Global Events and our film and photography team at Global Media Project for coordinating and capturing this experience.

This convening would not have been possible without support from the Surdna Foundation Board and Staff. Thank you to the Surdna staff members who volunteered and special thanks to our fearless leader Don Chen, who encourages us to explore new ways of learning and collaborating.

[i] E4 Youth's mission is to use "the arts, sciences, and technology to help youth find and pursue pathways to successful careers in the creative economy through hands-on-training, active mentorship, and exposure to real world opportunities." (https://e4youth.org/about/).

[ii] Rebekah Marie Yearout, "MLK50-ProPublica Methodist Hospital Debt Series Packs a Punch," 10/2/2019, https://mlk50.com/mlk50-propublica-methodist-hospital-debt-series-packs-a-punch-ea74e519c6d0.

[iii] Ibid.

[iv] "California Capital Access Program (CalCAP) for Small Business," California Pollution Control Financing Authority, https://www.treasurer.ca.gov/cpcfa/calcap/sb/index.asp.

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This report was produced by Estolano Advisors for Surdna Foundation.

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