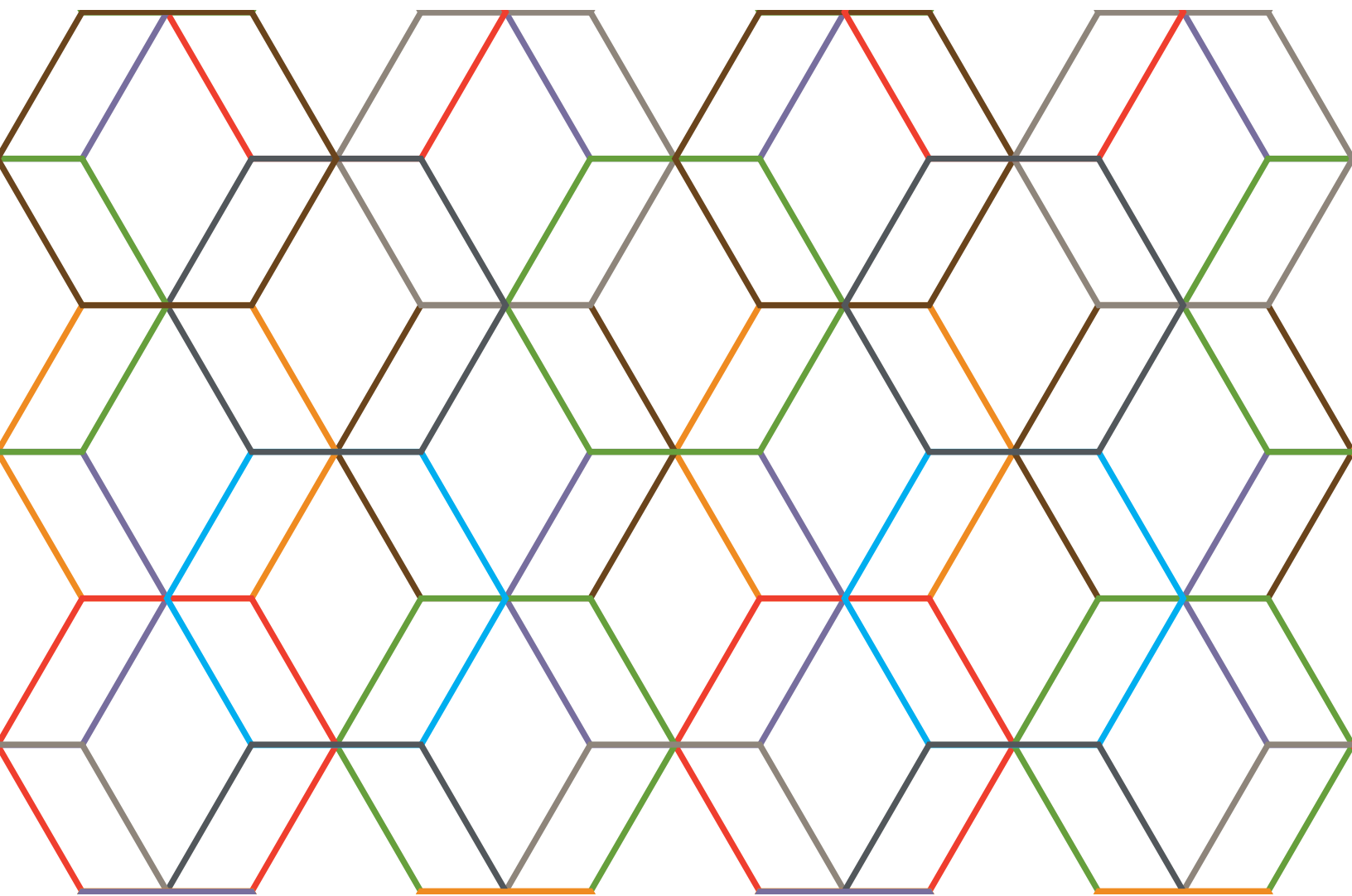


DEI LEARNING SERIES
FUNDER CASE STUDIES
ON DIVERSITY, EQUITY,
AND INCLUSION

FACILITATOR'S GUIDE



THIS FACILITATOR'S GUIDE is intended for use with the Funder Case Studies on Diversity, Equity, and Inclusion (DEI). Created by the Ford Foundation's Office of Strategy and Learning, these training materials aim to help funders become better adept at addressing DEI issues that arise in grantee organizations. The case studies can be used either individually or as a set.

DEI LEARNING SERIES

Funder Case Studies
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Facilitator's Guide

AFTER ENGAGING WITH THESE CASE STUDIES, PARTICIPANTS WILL BE EQUIPPED TO:

- Build familiarity and comfort in dealing with challenges of DEI issues in grantee organizations
- Consider how they would respond to the DEI issues that emerge
- Recognize best practices across the cases
- Identify the support they need to navigate these kinds of issues.

THE CASE STUDIES

1

CONFRONTING ACCUSATIONS AGAINST LEADERSHIP: "JUSTICE FOR ALL"

An organization is confronted with a series of sexual harassment allegations against its executive director and management team.

2

ADDRESSING RESISTANCE TO CHANGE: "HEALTH EQUITY AND ADVOCACY LEADERS"

An organization's leadership staff and board are not representative of the communities with which they work, and its leadership is slow to make changes to diversify the organization.

3

WRESTLING WITH RESTORATIVE JUSTICE: "ALLRIGHTS"

In addressing allegations of sexual harassment against a staff member, an organization pursues a restorative justice approach.

4

WORKING WITH WHISTLEBLOWERS: "NETWORK FOR THE PEOPLE'S GOOD"

An organization's staff ask for help addressing a workplace environment that is seen as hostile and unfair to women of color.

HOW TO USE THESE CASE STUDIES FOR GROUP LEARNING

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These case studies work well as a classroom-based learning and discussion tool, whether virtual or in person. When participants have the opportunity to read through the cases with their colleagues and identify shared and common experiences, they can explore the themes more deeply and surface collective knowledge and expertise.

Sample facilitator notes for using case studies in small groups

Session name: Responsible grant making: Diversity, equity, and inclusion

Time: 120 minutes (for small groups of at least 3 people)

FACILITATORS

- Two large-group facilitators, one to lead the session and another to capture notes on a flip chart or dry-erase board
- One case study facilitator for each small group

MATERIALS

- A complete set of case studies for each participant (without the corresponding program officer reflections sections)
- Copies of the program officer reflections sections for each case
- Copies of “Guidance for Engaging Grantees on Issues of Diversity, Equity, and Inclusion” (one for each participant)
- Flip charts, one for each small group
- Dry-erase board (or large flip chart), for facilitator use
- Markers

PREPARATION

- Divide groups to encourage different perspectives and experiences to emerge, where possible.
- Assign one case study and case study facilitator to each group. Provide the facilitator with the case study and accompanying program officer reflections, so they can review them.

ROOM SETUP

- Tables to accommodate small groups
- A flip chart at each table
- Dry-erase board (or large flip chart) at front of room

PART ONE:

INTRODUCTION AND LARGE-GROUP SHARING (15 MIN)

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Introduce the session, working from the following talking points:

Why these cases were developed

- The emergence of the #MeToo movement and related conversations have brought new attention to issues of inequity, sexual harassment, and misconduct among civil society organizations.
- Program officers and grant-making staff across foundations have expressed the need for shared resources that address the challenges of responding to DEI-related issues that arise with grantees.
- These case studies are a way to draw out and share existing learning and experiences from program officers.
- Discussing the case studies helps to identify a set of best practices that can support program officers and grantees.
- The discussion also provides an opportunity to explore what additional support program officers need to navigate these types of DEI-related situations.

Give an overview of the session and its learning objectives

Establish ground rules for creating a safe, shared space to explore these challenging issues. They might include:

- We share a responsibility to be respectful, honest, and open.
- We are all here to learn, and are in different places based on our own experiences with DEI.
- We should ensure confidentiality so participants can discuss things honestly: “Leave the details, take the learning.”

Lead participants through a quick brainstorm activity: “What is on your mind related to DEI and grantees/grant making?”

- Have participants discuss this question in small groups for 5 minutes.
- Ask for the top two issues from each group, and record them on the dry-erase board, summarizing and pulling out common themes and concerns.
- Note that the group will revisit this list at the end of the session to see which issues were covered in the case study discussions and which need further exploration.

PART TWO:

SMALL GROUP EXPLORATION OF CASE STUDIES (45 MIN)

Outline instructions for working through the case studies in small groups:

- Have the case study facilitators identify themselves to the group they've been assigned to.
- Hand out the assigned case studies to each group, making sure not to include the program officer reflections or the guidance document.
- Allow 5-10 minutes for participants to independently read through the case study assigned to their group.
- Have the case study facilitators lead their group through the discussion questions included in their case study.
- In the last 10-15 minutes, prompt the groups to wrap up their discussion and begin summarizing key points on the flip chart at their table, including the following:

Key challenges identified in their case study

Best practices identified in their case study

Support still needed to respond effectively to these challenges

PART THREE:

LARGE-GROUP SHARING AND DEBRIEF (45 MIN)

Lead a large-group discussion, having each small group share the following:

- A quick synopsis of their case and what they discussed
- What is on their flip chart regarding key challenges, best practices, and support still needed

Pull out best practices from across the flip charts and make a running list on the dry-erase board.

Call out the key similarities, and identify people in the room who have experience and expertise in navigating these issues.

- For example, "There are colleagues here you can call on for additional support based on their experiences, including..."
- Emphasize that these are challenging issues, and in navigating them it's important to build an open and honest dialogue, listen, and ask good questions.

Have participants review the guidance document, "Guidance for Engaging Grantees on Issues of Diversity, Equity, and Inclusion."

Lead a brief discussion, asking what they would add or change.

PART FOUR:**PROGRAM OFFICER REFLECTIONS (15 MIN)**

Hand out the program officer reflections for the assigned cases, and allow each table 1-2 minutes to review them.

Give each small group 5-7 minutes to discuss whether the reflections bring up any additional insights or best practices to consider.

Ask each group to share one additional reflection with the larger group.

Review the summary list of best practices to recap the collective knowledge and ideas in the room.

Revisit the list from the quick brainstorm at the beginning of the session and highlight how many of those issues are addressed on the best practices list.

Ask for any closing thoughts or reflections.

If there are items on the initial brainstorm list that were not addressed, create a list of items to follow up on.

The Ford Foundation Office of Strategy and Learning helps program teams develop empirically grounded strategies to reduce inequality and to build evidence for how social change for good happens. We aim to share what we're learning with others in philanthropy and the social justice sector at large. Read more about what the foundation is learning at fordfoundation.org/learning

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