

# Guidance for Funders on Preventing and Responding to Discrimination and Harassment

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The sessions were hosted by Ariadne, Ford Foundation and Open Society Foundations and the Funder Safeguarding Collaborative.

## 1. Define your values and principles:

- Have conversations within your institution about your values and the guiding principles you want to adhere to when it comes to addressing harassment and discrimination.
- Consider whether you would like to have these written down or not, and how and when you would like to communicate about them internally and externally.
- Clearly articulate your values and link these to the way you approach cases of harassment and discrimination.

## 2. Define your approach:

- Develop a common institutional understanding of expectations and concrete steps you plan to take when becoming aware of a case.
- Whether you choose to adopt a formal protocol or not, it is important that you clarify what to do when a case is brought to your attention.
  - An approach should typically include the following components:
    - Knowing whom to contact in your organization and when;
    - Agreement on engagement with grantees, what, how, and who to communicate with, etc.;
    - Knowing what resources you can offer grantees, if any; and
    - Agreement around the conditions that would lead you to stop funding.
- Make sure that your approach has flexibility built into it, giving you the ability to take into account and mold your response according to the particularities of each case.

## 3. Address your own internal practices and culture:

- Do an inventory of what policies and practices your organization has in place to address harassment and discrimination internally. Gather any information you might have on what has been working well and what remains a challenge.
- Conduct an analysis of your internal culture on diversity, equity, and inclusion. This will vary every organization, but can include:
  - Collecting demographic data of staff, and especially leadership
  - Conducting staff satisfaction surveys, informed by demographic data
  - Understand how staff from different communities are experiencing the organization. Who is missing from decision-making spaces? Who has power in the organization? Who doesn't?
  - Focus especially on how your organization is doing in efforts to meaningfully include people from historically marginalized communities in all you do, and especially decision-making spaces.
  - Identify areas where you might need to adopt or shift policies, provide trainings, and promote new practices. Note that while policies are never sufficient, they might be an important necessary step in many areas, including for example for inclusion of people with disabilities or LGBTQ people in your organization.
- Consider concrete ways in which you can improve upon what you have, and the resources you might need to do it. Do not be discouraged if there is still much left to improve--you are not alone. What is important is that you start and continue this work.
- Be transparent with grantees about where you are as an institution.

#### **4. Equip Program Officers to have conversations about DEI:**

- Conversations about diversity, equity, and inclusion, harassment and discrimination can be sensitive, uncomfortable, and difficult.
  - This is one of the greatest obstacles program staff cite for why they do not engage on these issues. It is important to break through the discomfort.
  - Recognize and name the main challenges you and your grantmakers might be facing to talk to grantees about these issues. Some of these can be institutional, others deeply personal.
    - For example, some program officers might feel uncomfortable about asking about grantee's policies and practices in addressing harassment if they know their own institution is deeply lacking on the issue. A white program officer might feel uncomfortable asking a Black executive

director about how their organization approaches racial inclusion. But that does not mean these conversations should be avoided.

- Becoming more comfortable with talking about these issues takes practice, and gets easier with time and experience. Resources, trainings and role-playing can help, but will not substitute ongoing practice with grantees, making mistakes, and learning from them.
- If you have dedicated staff with more experience in having these conversations, it can be helpful to organize peer learning sessions.
  - Where appropriate and with the consent of the grantee, program officers can also consider inviting other grantmakers to site visits or other conversations so that they can see how these discussions are approached in practice. But keep in mind that because of the sensitive nature of conversations around DEI, this might not be possible with most grantees.

#### **5. Proactively engage and support grantees:**

- Do not wait for the first conversation you have with grantees about discrimination and harassment to be after an allegation surfaces.
- Communicate your values and expectations as a funder from the start. Have conversations with grantees about how they themselves define their values, and develop an understanding of their internal practices, culture, and policies on DEI more broadly, and how this affects their external work, priorities, and goals.
- Be patient and keep in mind that it can take time for grantees to develop relationships with you where they might feel comfortable sharing frankly about their DEI practices and experiences--and that is OK. The important thing is to open the door, start, and continue the conversation.
- Proactive conversations can also help bring cases to light that otherwise you would not be aware of. Remember that just because you are not aware of a case does not mean that cases are not happening. Survivors might not feel safe reporting cases, the grantee could be withholding information, or not understand what they should be sharing.

#### **6. Take stock of who you are funding and why, and make changes where needed:**

- Look at your full portfolio of work and consider what kinds of organizations you are funding, who they are led by, and how are they holding themselves accountable to the people most impacted by their work.

- Do a power analysis of who are the communities most impacted by the issues you fund, and who you are funding to address these issues.
  - Do this for all work you fund, as all issues require an intentional power analysis to identify those who are the most impacted. Without this analysis, organizations that might claim to work on behalf of “all people” are unlikely to adequately represent and be accountable to communities disproportionately affected by their work.
  - Even fields working on social justice tend to replicate power in predictable ways. Almost all organizations have work to do in being more inclusive and disrupting power. This means having conversations with all organizations.
- Inquire how your own funding practices might be shaping who is at the table, and who is missing. Collecting demographic data (where possible) from grantees can be a powerful tool for this analysis. This can be a complex and challenging process. As you arrive at an appropriate demographic taxonomy for your context, it is important to recognize that the data will likely not capture complex identities, even while it still holds meaning and power. Demographic data cannot substitute meaningful engagement with grantees, the field more broadly, and the communities most affected.
- Shift funding towards grantees led by and accountable to the communities that they serve, and who are the most impacted by their work.

## **7. Continue to learn:**

- Make a plan to improve your learning with every case. Take time to reflect on how things went, what worked well, and what you would have done differently.
- Be open to revising your approach periodically, and communicate relevant changes in expectations with grantees.
- It can be valuable and helpful to consult or involve grantees when you are considering making changes to your approach, and to be transparent about your own learning. This can also help reassure grantees that we do not expect them to have this figured out, and are learning together.