


# Leading for Racial Equity with Peer Support

Reflections on the Power of Cohorts  
for Learning, Resilience and Action

**A**s inequality and racism continue to deepen divisions and impede equitable progress in our communities, leaders in the social sector — at both staff and board levels — have stepped up to exercise bolder leadership and pave the way for greater **racial equity, diversity and inclusion (REDI)**<sup>1</sup> within institutions and beyond.

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<sup>1</sup>We use the term racial equity, diversity and inclusion (REDI) as shorthand for addressing the complex and intersectional work of building more diverse organizations, creating inclusive cultures and achieving equitable outcomes and processes through a variety of strategies. Other groups use different terminology, including DEI or EDI, power-sharing, racial justice – all of which have slightly different emphasis and meaning.



How do leaders build more  
inclusive and racially equitable  
cultures and strategies?

This is not easy work.

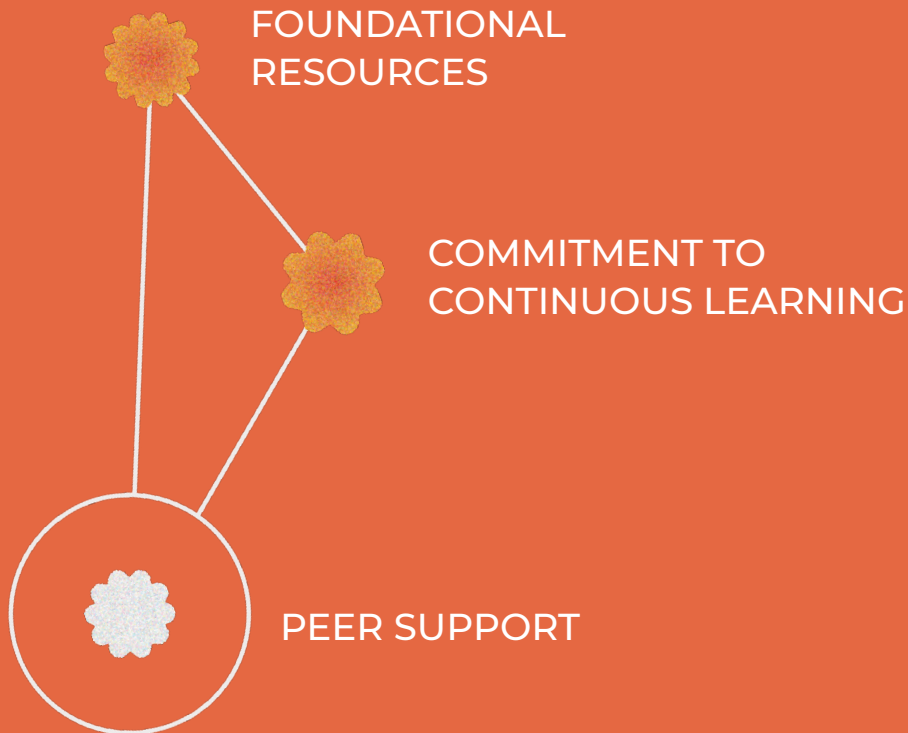


It is often more messy and unpredictable compared to other governance or leadership issues.

It is also deeply personal.

It involves reckoning with our own identities, our assumptions, our biases and the privileges we have been afforded.

## Peer Learning: The Missing Link for REDI Leadership




In 2013, The Giving Practice launched peer cohorts for executive leaders advancing racial equity, diversity and inclusion (REDI).

We observed that leaders were poised to make significant shifts towards REDI. They had access to trainings and resources to build foundational knowledge of REDI-related concepts and they had strong commitments to continued individual learning. But they were missing a critical link: peer support and spaces to explore their barriers, dilemmas and challenges to transformation.

Nine years later, more than 60 CEOs and trustees have now participated in our peer cohorts on advancing REDI and they continue today.

In this report we share our observations and themes that have surfaced throughout the years:

- 1 First, we name some of the leadership dilemmas we heard in our cohorts related to REDI topics, such as race, inclusion and power.
- 2 Then, we share themes on how peer cohorts can sustain leadership on complex racial equity initiatives.
- 3 We then share how cohorts moved many leaders to action, and end by acknowledging that racial equity work is not a destination but a lifelong personal and professional journey.



What we've learned is that leading on racial equity requires evolved strategies on a personal and professional level, and that peer cohorts offer a critical space for self-reflection, testing ideas and sustaining commitment.

With cohorts we continue to witness stronger, more committed leadership on racial equity, diversity and inclusion — including new initiatives, bolder discussions between CEOs and trustees, and collective action throughout.

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“This group has painted a whole new picture for me of what foundation CEOs are like.”

— Don Chen, President of the Surdna Foundation  
**CEO COHORT, 2019-2021**

We would like to thank the foundation leaders who stepped forward and participated in our peer cohorts over the years for the candor, humility, grace and humor they brought to our groups.  
(Please see a full list of participants on pages 33 and 34).

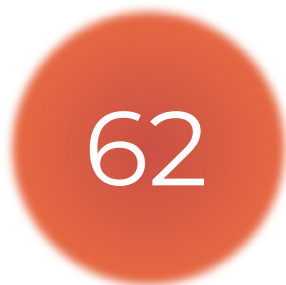
We would also like to thank Casey Family Programs and the Ford Foundation for funding this reflective piece and for supporting the launch of our trustee cohorts

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Sindhu Knotz, Audrey Haberman and Dawn Chirwa facilitated cohort groups.

## Our Cohorts at a Glance



years of cohort facilitation



total participants since 2012



of CEO cohort participants have continued to meet beyond our facilitated sessions

**36 CEOS AND 26 TRUSTEES  
ACROSS 6 GROUPS REPRESENTING:**

- family foundations
- private foundations
- community foundations
- native corporations
- public foundations
- health conversion foundations

# Keys to Our Approach

## **KEEP IT ROLE TO ROLE:**

Each cohort consisted of leaders in the same position or role to allow for more confidential and honest discussions related to the dynamics of those roles. We found CEOs and trustees to be more open, honest and vulnerable with a cohort of leaders who walked in their shoes.

## **SMALL IS BEAUTIFUL:**

CEO cohorts were capped at 10 participants; trustee cohorts at 16. We found the small group size allowed for building trust and intimacy quickly. Cohort meetings often included social time to deepen connections and relationships.

## **MAKE IT DIVERSE:**

We intentionally mixed groups geographically and demographically (i.e. race, gender, sexual orientation, etc.) and by foundation type as we found that leaders across these groups found much in common with one another in their leadership roles.

## **ENCOURAGE CANDOR:**

We wanted participants to show up authentically, sharing both what worked well and what did not work as well. Discussions were confidential, and that norm was reinforced throughout the program. This led to deeper exchanges about lived experiences than one usually observes in leadership gatherings. Because of this strict confidentiality norm, many stories in this report are anonymous or have become composite stories based on themes we heard.

Leadership Dilemmas on  
Race, Inclusion and Power  
in Philanthropy

Over the years, we've observed that **one of the most valuable aspects of peer cohorts is the confidential space created to grapple with thorny, complex dilemmas** that come with the territory of racial equity and inclusion initiatives. One CEO asked his cohort, "How do you explain the importance of transparency around your equity work to a family that values privacy over all else?" As a family foundation CEO, he explained how the foundation was leading successful racial equity partnerships with community groups, which had tremendous impact to influence other funders, yet the board did not want to communicate about their work publicly. This created a dilemma for him in his leadership role – how to be accountable to both his community and to his board.



"How do you explain the importance of transparency around your equity work to a family that values privacy over all else?"

— FAMILY FOUNDATION CEO

**To build cultures and practices that address racial equity, leaders often must address some of the most complex and challenging dilemmas of their careers.** We found that the peer consult model<sup>2</sup>, which involves sharing a dilemma and actively listening to how others have dealt with similar situations, was key to helping them navigate these dilemmas. The process encourages leaders to move into a reflective mode, where they gain some distance and can learn from others' experiences and questions. "When you are in a peer consulting frame, listening to colleagues talk about your dilemma in relationship to their own experiences, it is easier to access the creativity of your own brain," said Brian Boyd, CEO of the Forest and Sequoia Foundations. "If you are in the dilemma, it can be hard to see the path forward."

In our guide, *Philanthropy's Reflective Practices*, we discuss how group learning of this kind offers new insights and allows individuals to see a dilemma from a viewpoint they might have not seen before. In this way, the practice of the peer consultation is not solely about solving the issue, but also about building on each other's stories to create new knowledge.

To give a flavor of the cohort discussions, we share some of the dilemmas we observed consistently over the years that leaders faced as they deepened their organizations' racial equity and inclusion work.

<sup>2</sup> Cambridge Leadership Associates, LLC. "CLA Peer Consulting Methodology."

## 1. BALANCING STAFF AND BOARD EXPECTATIONS

CEOs navigated different expectations held by staff and board members regarding timing and decision-making in the context of new initiatives or strategies related to racial equity. Younger staff, who typically worked closely with grantees often moved with a sense of urgency given their proximity to the issues at hand. Meanwhile, board members who were more removed from the day-to-day often required extra time to learn and understand contextual information before making significant decisions related to shifts in strategy. Staff often viewed this slower pace as positional privilege. CEOs holding this tension needed space to explore a reframing of the roles of board and staff and the power dynamic between them. One CEO described feeling caught in the middle: **How do I navigate different expectations between board and staff, and move the board into deeper learning while addressing the urgency of staff?** The peer cohort group offered her a space to explore these issues. As a result, the board gave staff more agency to drive equitable grantmaking work and staff deepened their understanding of the importance of board/staff alignment and the time it may take.

## 2. THE BURDEN OF EDUCATING PEER TRUSTEES

Black, Indigenous and people of color (BIPOC)<sup>3</sup> trustees in our cohorts shared the isolating experience of being one of the only non-white leaders on their boards, and the exhaustion from being seen as a representative for communities of color amongst mostly white colleagues. One trustee of a private foundation sought advice from peers on how to build more allies among her board colleagues. **As a trustee who is also a person of color, how do I voice my concern that I feel burdened by the expectation that I will “teach” my white board colleagues?** The peer cohort group provided a space for her to share her frustration and exhaustion at the roles she constantly had to play, and advice on how to raise the issue with her board chair. Her experience was not uncommon, and several BIPOC leaders in our cohorts shared similar experiences of feeling like the “token” trustee of color.

## 3. SHIFTING NARRATIVES OF WEALTH GENERATION

Leaders in our cohorts like Sarah Walyczk, CEO of the Satterberg Foundation, used the peer consult process to get advice on how to help drive a conversation with their board about their foundation’s role in addressing systemic racism and white supremacy, and the story of their own legacy. **How can we examine a changing narrative about family wealth to acknowledge the extractive ways in which the wealth was generated?** Through dedicated racial equity training work with their board, the Satterberg Foundation leaned into an honest reflection and examination of their own power and responsibility to influence change, resulting in a clear statement for action that shifted from “we made this money” to “we are doing good things as stewards of this money.”

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<sup>3</sup> BIPOC: Black, Indigenous and people of color. By naming Black and Indigenous people, we acknowledge the disproportionate levels of injustice that Black and Indigenous people face.

#### 4. PERSONAL LEADERSHIP ON THE REDI JOURNEY

CEOs and trustees found their cohorts to be a valuable space to examine tensions and learning opportunities along their own individual REDI journeys. Brian Boyd, Executive Director of the Forest and Sequoia Foundations, shared his own journey as a white man learning about racial equity leadership.

**How can I be a better leader on racial equity, as a white male who has so much to learn?** Brian gained advice and confidence by discussing specific issues with his peers. “What I’m finding,” he said, “is that the more risk-taking I do and the more I speak up, the more I alienate some folks that I’d rather not alienate. But then I remember the north star for this work – it is not about making friends. It’s about a vision and it is messy and complex.” His ability to share candidly and openly about his own learning journey through the cohort was an inspiration to his peers.

Leadership dilemmas pose difficult choices and no easy solutions, and there are often many different pathways to a solution. Cohort participants found that there were no easy, “magic bullet” solutions to these dilemmas, but that the process of the peer consult helped illuminate new strategies and insights.

 METHODS

## The Peer Consult Model

The peer consult model<sup>4</sup> provides a semi-structured format for engaging peers in an objective and generative way to reflect on dilemmas or complex challenges. The value of the process lies in the group's diagnosis of the dilemma through brainstorming and offering alternative interpretations and/or new insights.

### STEPS WE USED TO BRING THE MODEL TO LIFE:

**1. FRAME THE DILEMMA:**

The presenter frames a challenging situation and explains the context, players and any challenging dynamics.

**2. CLARIFYING QUESTIONS:**

Peers ask clarifying questions to the presenter to gather information about the dilemma.

**3. GROUP BRAINSTORMING:**

Peers discuss the dilemma among themselves, without the presenter's participation, based on their own experiences. (Presenter faces away from group and takes notes to help stay in listening mode.)

**4. ACTION STEPS:**

Peers share specific advice about the dilemma back to the presenter – ways to move forward or steps to take.

**5. PRESENTER REFLECTIONS:**

The presenter re-joins the group to share initial reactions, reflections and questions that surfaced.

**6. GROUP DEBRIEF:**

The group debriefs how the process went and what they collectively learned.

<sup>4</sup>Cambridge Leadership Associates, LLC. "CLA Peer Consulting Methodology."



How Peer Cohorts  
Sustained Leaders on  
the REDI Journey

**H**ow do you hold difficult conversations about race and power? How do you hold spaces of uncertainty and discomfort that require heightened empathy, listening and self-awareness? And how do you do all this while co-creating new structures, practices and ways of participating within the organization and outside of it that align with racial equity goals?

Difficult conversations about race and power create spaces of uncertainty and discomfort, and leaders must hold this discomfort and create a positive vision for change when one is needed. This type of adaptive leadership<sup>5</sup> requires evolved strategies on a personal and professional level. For most of us, this is life-long learning that requires more than reading books or attending trainings. We need support and guidance from peers in similar roles to help us develop and sustain practices and a long-term commitment to REDI transformation.

Through stories from CEOs and trustees, we heard three themes highlighting the ways in which the peer cohorts offered support for these leaders to advance and sustain their REDI work:

### **1 IT'S LONELY AT THE TOP:**

First, we found that trusted spaces where leaders could be vulnerable allowed them to work across differences and helped to model discussions that leaders could then have in their own organizations.

### **2 MORE MINDS ARE BETTER THAN ONE:**

Second, we found that when they worked together, cohort leaders were able to explore dilemmas and gain insight, generating new knowledge to help them work through challenges.

### **3 MOVING FROM TALK TO ACTION:**

Finally, participants were held accountable to action and change by a group that was invested in their growth.

<sup>5</sup>Ronald A. Heifetz, *Leadership without Easy Answers*. (London: Harvard University Press, 1994).

Here's what we heard on why each of these three pieces were critical for these leaders:

### IT'S LONELY AT THE TOP

**Cohort leaders experienced what it was like to be in a trusted space where they could be vulnerable and work across differences.**

Leaders are often recognized as experts and are in their roles because they are decisive or have subject matter expertise. In working to advance REDI, there are few spaces where leaders can be completely honest and vulnerable about their own skills, knowledge and biases. Leaders need venues where they can let down their guard and admit to their learning opportunities without feeling fear or embarrassment.

**Yet finding spaces where leaders can be vulnerable is a challenge**, particularly for the often lonely and isolating roles of CEO and trustee. Peer cohorts provide an environment where leaders can experience what it felt like to be in a trusted space and where they could be open and vulnerable about their challenges. "It is a gift to have a place like this where we are not blinded by the masks we wear," says Kris Hermanns, CEO emerita of Pride Foundation and member of our first cohort. Doug Stamm, CEO emeritus of Meyer Memorial Trust, put it this way: "There is a lot of posturing and competition among philanthropic leaders. In this group, pretenses have been washed away."

Finally, **once trust was built, cohort participants relied on each other for the emotional support needed to sustain their work**. Several CEOs remarked how their commitments to REDI required an immense amount of time and attention, and nearly all of them remarked on the emotional toll of the work. In particular, BIPOC CEOs and trustees expressed how balancing between professional roles and personal experiences of trauma and racism created added layers of stress and exhaustion. "This work requires time, skills, emotional endurance...it's highly emotional work," said one CEO of color. Because we designed each cohort to include only those in the same role, the cohorts also provided support from colleagues in positional roles who could relate and empathize with similar challenges. Brenda Solorzano, CEO of the Headwaters Foundation, likened the time



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— DOUG STAMM, CEO EMERITUS  
MEYER MEMORIAL TRUST





“Being part of this group has been so validating. I don’t feel so alone in the work.”

— **BRENDA SOLORZANO, CEO  
HEADWATERS FOUNDATION**



in the peer cohort to her experience in cancer support groups, where she found emotional support from those who truly understood her. “Being part of this group has been so validating. I don’t feel so alone in the work,” she said about her cohort experience.

Luz Vega-Marquis, President and CEO emerita of the Marguerite Casey Foundation says “This group has sustained me and given me hope. I have been so tired and fatigued after all these years of the fight. This group has helped re-commit me to this work.” Our cohorts provided a place for refuge and inspiration. **In some cases, it was the only space for leaders to share how difficult this work is for them.** We

heard time and time again that leaders felt a renewed sense of hope and inspiration after leaving the cohort meetings. “This cohort was grounding and centering for me when I felt paralyzed in a difficult situation,” said Phil Li, President and CEO of the Robert Sterling Clark Foundation. “The group lifted me up when I was feeling vulnerable.” With work that is this emotionally exhausting, a trusted peer network where leaders can work across difference is not only valuable; it is imperative.

## **MORE MINDS ARE BETTER THAN ONE**

**Cohort leaders worked together to gain insight on classic dilemmas on racial equity, diversity and inclusion.**

While there are good tools and frameworks available to help funders define terms and identify initial steps, there is no easy road map to addressing inequity in our society. Cohort leaders found that beyond any framework, by working together and through co-consultation, they were able to generate new insights. Max Williams, President and CEO of the Oregon Community Foundation, said “When we started the project, I wanted a practical outline or template of how to infuse diversity, equity and inclusion into the foundation and its culture. Through this work my eyes have been opened. I guess if it were that simple the work would have been done a long time ago.”

For example, one trustee shared the opportunity of bringing new people of color onto a board that comprised all white family members. As board chair, he was concerned the board had a deferential culture that avoided conflict and wanted advice on how to bring on new members in an inclusive way,

where they felt they had equal footing and voice with the more tenured family foundation members. Through peer consultation, the trustee found advice on how to structure onboarding and initial discussions in a way that would enable newcomers and family members to feel comfortable with differences in opinion or new ideas for going forward. More importantly, he was reassured that his own role in preserving and protecting the family's priorities were not at odds with his instincts to create a board more inclusive of community voices.

Another CEO used the peer consultation to explore resistance he faced from board members who were reluctant to be public about their equity-related advocacy work, given their values of privacy and humility. He felt this position reflected privilege, and that grantees would have benefitted from more open communications about work the foundation was already doing. The peer consult helped him name this assumption and hear insights on how other leaders had found ways to message and communicate within boundaries, and ways to help board members become more comfortable with using their voice.



“This group has sustained me and given me hope. I have been so tired and fatigued after all of these years. This group has helped re-commitment to this work.”

— **LUZ VEGA-MARQUIS, CEO EMERITA MARGUERITE CASEY FOUNDATION**



## MOVING FROM TALK TO ACTION

**Cohort leaders used the group to hold themselves accountable to action.**

Peer cohort members leaned on their peers to test their assumptions about what needed to be done and to hold themselves accountable to new actions. They shared early drafts of written documents and sought counsel regarding dilemmas they faced when putting actions into play. “When you operate in isolation, you can become an instrument of the organization you serve. I found the cohort experience helped to keep me accountable,” said one CEO cohort member.

Several foundations in the cohort went through significant organizational change efforts. These changes included embedding equity more deeply in internal policies and systems, launching CEO transitions, and building trustee buy-in and ownership around an equity agenda. CEOs and trustees commented on how the stories and experiences of peers helped

shape thinking about their own environments and inspired new actions.

“I appreciated the circular and empathic feedback loop that carried over from meeting to meeting, or any time we saw one another,” says Doug Stamm, “The cohort was always interested in knowing how the ideas we discussed in the dilemma conversations played out in our respective workplaces.”

One CEO shared her experience of addressing equity during an HR benefits and policy review. For the first time, the foundation created a staff committee to review policies with an explicit equity lens.

The CEO wanted a result that honored different staff needs, family structures, income levels and other equity considerations, even when some of these requests required weighing costs against a more standard industry benefit. The cohort discussion helped to reassure this CEO that her concerns about the new policies were fair and appropriate, and also generated a robust discussion among other CEOs about addressing equity within internal policies and some of the tensions it can create.

**CEOs and trustees would often come to one another to get a second opinion on something they wanted to implement**, and this helped instill a sense of courage to act. Furthermore, they used one another to stay accountable to actions. For example, one CEO sought advice on how to structure one of the first discussions about equity with a family foundation board of directors. The trustees, a group with no people of color, were not keen on the language of “equity” as it felt divisive and political to them. Through support from the peer cohort, the CEO found support on how to frame a discussion on the importance of equity as a value, and some tips on how to help the board explore its own resistance to equity. She continued to follow-up with the cohort group in subsequent meetings on how her board was evolving in their own adoption of specific priorities related to equity.



“This cohort was grounding and centering for me when I felt paralyzed in a difficult situation. The group lifted me up when I was feeling vulnerable.”

— PHIL LI, PRESIDENT AND CEO  
ROBERT STERLING CLARK FOUNDATION



 METHODS

## The Power of Storytelling

How do you help busy people who don't know each other develop trust quickly and create connections with one another?

We found storytelling to be a critical tool to foster environments of trust, candid reflection and vulnerability.

We began each cohort with several hours of sharing lived experiences about how the values of equity and inclusion have shown up in the lives of leaders. For example, one female CEO of color, who ran a large, private foundation, marveled at how much she had in common with a white female CEO of a small family foundation. "I never thought I would say this, but I see myself in you," she said. In another example, when one CEO of color shared an experience of racism at a national philanthropy conference, it helped other white leaders in the cohort name how much privilege they hold due to their skin color.

In this way, we witnessed powerful moments of connection for leaders – even across differences. One female CEO of color admitted that through the cohort process, she was able to shift her perception of white male leadership, as she began to form relationships with other cohort leaders who she saw as true allies. "This group has given me hope for real change," she said.

Race alone cannot account for the depth of our lived experiences, and we all hold implicit biases about each other. We witnessed how some personal stories helped to flip initial assumptions or biases on the basis of race. "I learned today that what you see is not what you get," said one CEO of color, after hearing a personal life story of a white male colleague which challenged her preconceived notions of his upbringing.

The cohort connections among CEOs and trustees allowed leaders to challenge their own assumptions and implicit biases. Sharing stories provided a commonality in lived experience across diverse groups of leaders.

Nine Years Later:  
The Impact of Peer Cohorts



Over the years, key REDI initiatives have been developed after being seeded or discussed in our cohort groups. CEOs proposed new initiatives such as non-discrimination policies, internal staff policies that align with equity and new recruitment strategies. Trustees found the courage to address long-standing issues on their boards, such as revising board policies to create term limits or bringing non-family members onto long-standing family-only boards. Both trustees and CEOs spoke about their ability to find their voice, challenge resistance internally and articulate their own fears or uncertainties about what they know and what they don't know in racial equity and inclusion work. Most importantly, leaders in our cohorts have come together for new collective actions, such as creating a fellowship program for BIPOC professionals.

In the tables below, we list some of the specific impacts that participating foundations and leaders experienced, based in some part on the cohort experience.

## IMPACTS OF PEER COHORTS

### NEW INITIATIVES:

- Diversifying all levels of staff to include more BIPOC team members
- Shifting grantmaking strategies to focus more exclusively on trust-based practices, participatory grantmaking and equitable approaches
- Developing new values to center racial equity more squarely in strategy and programs
- Revamping internal systems to embed equity across organizational policies, including recruiting/hiring, compensation and vendor policies
- Hiring non-family members to family boards and reducing board tenures
- Making a shift towards impact investing with REDI as a core tenant
- Hiring DEI and racial equity consultants to help with learning plans, culture building and revising strategies

### BOLDER CONVERSATIONS:

- Encouraging family foundation boards to undergo racial equity training and adopt equity statements
- Leading with newly found courage to address longstanding issues on their boards
- Trustees articulating their own fear and fragility and be met with empathy and understanding that provides reassurance
- Introducing proposals for board tenure limits and hiring non-family board members
- Exploring staff/board role clarity and encouraging trustees to “stay in their respective lanes” on racial equity work
- Sharing personal practices for self-reflection and resilience

### COLLECTIVE ACTION:

- Co-developing strong leadership strategies by testing and learning with peers
- Trustees developing norms, practices and agreements to hold one another accountable
- CEOs creating of a fellowship program through collaborative seed funding
- CEOs collaborating to form another cohort exclusively on investment policies with an equity frame

The Long Game:  
A Personal and Professional  
Journey

Racial equity, diversity and inclusion work is deeply personal and requires a unique set of skills to effectively navigate in leadership roles. The importance of personal mastery and self-awareness to greater leadership is not new; many books outline why self-reflection and awareness is critical. In our cohorts, we found that **leaders used this space to reflect on their own strengths and weaknesses, using their colleagues as informal coaches to help them improve leadership skills.**



“Because of the relationships in this group, I can show up and lead more effectively as a white ally.”

— KRIS HERMANN  
CEO EMERITA,  
PRIDE FOUNDATION



Several CEOs and trustees remarked that **the cohort process helped them show up differently as leaders.** Kris Hermanns talked about her journey as she committed to making racial equity a central tenant of Pride Foundation. She had just started in her role as CEO of Pride Foundation when our first cohort started. “I wish I had known how hard it would be to work on racial equity work in a predominately white organization. The emotional and human dimensions of the work were much deeper and richer than I expected,” she said. Kris explained how she worked on the structural pieces first, but it took more time and more self-reflection to see the emotional side of the work. “Because of the relationships in this group, I can show up and lead more effectively as a white ally. I can lead with vulnerability and I don’t take things as personally as I would have several years ago.”

One of the most common learning challenges we found was how multiple trustees and CEOs in separate cohorts remarked how they **felt a sense of imposter syndrome around REDI.** Imposter syndrome – when a leader doubts their accomplishments or talents and has a persistent internalized fear of being exposed as a “fraud” – is not unusual. Many leaders struggle to find the language for discussion about race and power. For white leaders, we heard a sense of fragility and guilt in acknowledging their own privilege. BIPOC leaders, we heard a sense that they are often expected to have the answers, or they are called upon to raise issues of REDI at meetings “I’m a person of color,” said Jason Fussell, Vice President and Trustee at Pride Foundation, “but I still have a lot to learn.”

Other forms of daily reflection proved important for many leaders. Karen McNeil Miller, CEO and President of The Colorado Health Foundation, used her commute home from work to reflect on the day and acknowledge her own behaviors and actions. “I would ask myself - how did I show up

today?” she said. This resonated with other CEOs in her cohort. As simple as sounds, creating a discipline of reflecting on your day – especially in writing – can help lead to better outcomes. Leaders listen to their peers and are influenced by practices their peers use. Research shows that leadership can improve with practices to pause, reflect, observe behaviors and shift approach, and we’ve observed that it is more helpful for leaders to hear about these practices from other leaders.

At the outset, many leaders would ask us why they should spend time in a cohort, concerned that it might be mostly talking and no action, or when it felt like a waste to spend money on professional development. We believe that peer learning is not about “navel gazing,” it is about learning, growth and action that can influence our sector. **In our cohorts, leaders found a space to learn, take risks, test new ideas and reflect on their own strengths and areas for growth.** By design, our cohorts offered a space to build trust and participate in honest discussions about race, power and the privilege leaders hold as CEOs and trustees of philanthropic institutions. Theory supports what we know intuitively – that group learning creates the space for new knowledge to be generated, for new ideas to take shape and for collective action.



“I’m a person of color, but I still have a lot to learn.”

— JASON FUSSELL  
VICE PRESIDENT AND TRUSTEE,  
PRIDE FOUNDATION



# Appendix

# The Theory Behind Peer Learning

There is a growing body of theoretical research that supports what we share anecdotally throughout this paper; that cohorts are powerful structures because of the way group learning promotes individual learning. **Group learning not only provides the emotional support and the resilience required for the long game of building racially equitable, diverse and inclusive organizations, but it can also be the catalyst for new knowledge and insights for everyone in the group.**<sup>6</sup>

## GROUP LEARNING CAN DRIVE INDIVIDUAL LEARNING

Under the right circumstances, group interactions lead to the construction of new insights, shared meaning and different individual cognitive perspectives, which is the basis of knowledge formation.<sup>7</sup> Organizational theorists describe how collective learning can drive the process of individual learning – rather than the other way around – by creating space for new narratives. These new narratives can help facilitate greater insight and sense-making, which in turn can promote individual learning and the exploration of new paths of action.

## GROUP LEARNING CAN SUSTAIN INDIVIDUAL BEHAVIOR CHANGE

Research in leadership development identifies the ways in which peers can help us as individuals sustain our own personal transformations. As human beings, we use our own relationships to interpret our actions, and using feedback we are given permission to change and to learn. Authors Boyatzis and McKee argue that “honest dialogue can spark our own creativity, new ways of understanding self and others, and help us stay the course. This takes courage and persistence. . . it is a lot harder to stop the process of developing yourself when you have other people invested in helping you change.”<sup>8</sup>

## GROUP LEARNING PROVIDES A VENUE TO IDENTIFY TRUSTED RESOURCES AND RELEVANT PRACTICE KNOWLEDGE

Rather than knowledge producers – such as publications or organizations – funders tend to rely on peers for knowledge acquisition and perceive colleagues in similar roles as possessing credibility and expertise. Trusted individuals are those with credibility and expertise, and often those in similar roles.<sup>9</sup> The Hewlett Foundation and Harder and Co. released a 2017 report that found that funders prefer products and sources from trusted sources, such as peers and colleagues.

<sup>6</sup> Jan Jaffe, “Reflective Practice for Learning from Experience: Navigating the Back Roads at Work,” *The Foundation Review*, 11, no. 1 (2019).

<sup>7</sup> Jean Hartley, Lyndsay Rashman and Erin Withers. “Organizational Learning and Knowledge in Public Service Organizations: A Systemic Review of the Literature,” *International Journal of Management Reviews*, 11 no.4 (October 2009).

<sup>8</sup> Richard E. Boyatzis and Annie McKee, *Resonant Leadership*. (Boston: Harvard Business School Press, 2005), page 104.

<sup>9</sup> “Peer to Peer: At the Heart of Influencing More Effective Philanthropy,” *Harder+Company*, 2017.

We began our exploration of peer cohort work with the belief that peer cohorts offered a missing link between published tools and education, and individual learning. We continue to believe that (1) leaders need a certain level of knowledge about concepts like structural racism, implicit bias and the root of inequality to effectively lead the work; (2) leaders need an awareness of “self” so they can navigate uncertainty and hold the tension and conflict that this work ultimately creates; and (3) leaders need a network of peer advisors who can help them sustain the work. These elements are mutually reinforcing because learning does not only occur in isolation. Leaders need to be in relationship with one another to gain important feedback on their actions, and to generate new insights and pathways for racial equity work.



# The Giving Practice's Peer Cohort Participants: Trustees

Please note that the list below reflects the name of the organization that each participant was with during the time of their participation in our cohort.

**Katie Bell**, Group Health Foundation

**Laura Berry**, William Caspar Graustein Memorial Fund

**Vivian Bolans**, Dogwood Health Trust

**Sean Boyd**, Satterberg Foundation

**Kira Bravo**, Whatcom Community Foundation

**Cherie Buckner-Webb**, Northwest Area Foundation

**Chris Cardona**, Winthrop Rockefeller Foundation

**Sarah Cavanaugh**, The Russell Family Foundation

**Truman Collins**, Collins Foundation

**Gillian Crossan**, Women's Funding Alliance

**Jason Fussell**, Pride Foundation

**Mitchell Hornecker**, Meyer Memorial Trust

**Dawna Ledbetter**, Dogwood Health Trust

**Ryan Luria**, The Collins Foundation

**Lebron McPhail**, Mat-Su Health Foundation

**Rivkah Beth Medow**, Kenneth Rainin Foundation

**Kris Norosz**, Rasmuson Foundation

**Karen Kramer Occhiogrosso**,

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**Jan Olmstead**, Group Health Foundation

**Mary Olson**, Mat-Su Health Foundation

**Brandy Pirtle-Guiney**, Pride Foundation

**Francisco Rios**, Whatcom Community Foundation

**Carmen Rojas**, Marguerite Casey Foundation

**Yvonne Sanchez**, The Russell Family Foundation

**Lisa Wade**, Mat-Su Health Foundation

**Charles Wilhoite**, Meyer Memorial Trust

# The Giving Practice's Peer Cohort Participants: CEOs, Executive Directors and Presidents

Please note that the list below reflects the name of the organization that each participant was with during the time of their participation in our cohort.

**Cynthia Addams**, The Collins Foundation

**David Addams**, William Caspar Graustein Memorial Fund

**Susan Anderson**, The CIRI Foundation

**Brian Boyd**, Forest Foundation and Sequoia Foundation

**Vanessa Briggs**, Brandywine Health Foundation

**Don Chen**, Surdna Foundation

**Anthony Chiang**, Empire Health Foundation

**Michelle DePass**, Meyer Memorial Trust

**Denis Hayes**, The Bullitt Foundation

**Phil Henderson**, Surdna Foundation

**Kris Hermanns**, Pride Foundation

**Mauri Ingram**, Whatcom Community Foundation

**Erin Kahn**, Raikes Foundation

**Diane Kaplan**, Rasmuson Foundation

**Philip Li**, Robert Sterling Clark Foundation

**Nichole Maher**, Northwest Health Foundation

**Karen McNeill Miller**, The Colorado Health Foundation

**Dona Ponepinto**, United Way of Pierce County

**Jen Rainin**, Kenneth Rainin Foundation

**Norman Rice**, Seattle Foundation

**Martha Richards**, James F. & Marion L. Miller Foundation

**Elizabeth Ripley**, Mat-Su Health Foundation

**Brenda Solorzano**, Headwaters Foundation

**Unmi Song**, Lloyd A Fry Foundation

**Doug Stamm**, Meyer Memorial Trust

**Trevor Storrs**, Alaska Children's Trust

**Keith Thomajan**, United Way of the Columbia-Willamette

**Bob Uyeki**, Y&H Soda Foundation

**Luz Vega-Marquis**, Marguerite Casey Foundation

**Liz Vivian**, Women's Funding Alliance

**Sarah Walczyk**, Satterberg Foundatoin

**Kevin Walker**, Northwest Area Foundation

**Mailee Walker**, Claneil Foundation

**Sam Whiting**, Thrive Washington

**Max Williams**, Oregon Community Foundation

**Richard Woo**, The Russell Family Foundation

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