

UNITED WAY OF THE BATTLE CREEK AND KALAMAZOO REGION: A COMMITMENT TO RACIAL EQUITY

A United Way Innovation Case Study



Serving two small cities nestled in southwestern Michigan, United Way of the Battle Creek and Kalamazoo Region leads with a strong belief that every person brings unique strengths and perspective to build diverse and stable communities. In the past decade, this United Way has clarified its racial equity focus in the realms of funding, internal practices, sponsorships, trainings, and disaster relief. They have developed partnerships with groups like The Truth & Titus Collective (T&T) to examine their own internal procedures in efforts to better center equity in their mission. Last year United Way's efforts were recognized with a Catalyzing Community Giving (CCG) Grant from the W.K. Kellogg Foundation to better understand and support philanthropic activity in communities of color. Most recently, the United Way has supported Black, Indigenous, and people-of-color (BIPOC)-owned businesses during the COVID-19 pandemic through the Kalamazoo Micro-Enterprise Grants (KMEG) program, a partnership with the City of Kalamazoo.



BACKGROUND: THE 2012 MERGER AND AN EMPHASIS ON EQUITY, DIVERSITY AND INCLUSION

When United Way of the Battle Creek and Kalamazoo Region merged back in 2012, both teams wanted to strengthen their racial equity focus. A core functional group of staff was convened to provide cohesion and collaboration in a new organizational culture focused on equity, diversity, and inclusion (EDI).





As a result, United Way established a partnership with the Center for Diversity and Inclusion in Battle Creek. This partnership provided introductory equity training to the staff leadership, and a separate partnership with the Nonprofit Network out of Jackson, Michigan, provided training to the United Way Board.


Additionally, a community engagement position was created as a result of Battle Creek becoming a [Beacon Community](#). This position and subsequent work were heavily rooted in equity and Harwood Institute-modeled community conversations. After the new impact model was released in 2015, United Way created internal committees to dismantle historical silos resulting from departmental structures and to encourage learning across the entire organization around the impact work.

UNITED WE FIGHT. UNITED WE WIN.
LIVE UNITED

Impact Area Goals

UWBCKR has a special interest in equity and the reduction of economic and racial disparities in systems and outcomes.

-  **Improve high school graduation rates and reduce racial and economic disparities in graduation rates**
-  **Increase the number of economically stable households in the region**
-  **Improve family and infant health and reduce racial and economic disparities in related indicators**
-  **Ensure that our regional community has a safety net in place to help individuals and families access basic necessities during times of need**



Community Impact Evolution

After the merger, United Way redesigned a Community Impact structure with a core focus on four categories: Basic Needs, Education, Health, and Financial Stability.

United Way is careful to create specific equity goals surrounding each category. For example, right now their team is looking to improve health outcomes by tackling infant mortality rates with an emphasis on the racial disparities, recognizing that infants born to African American mothers are dying at twice the rate as infants born to non-Latinx white mothers.¹

Furthermore, United Way is evaluating the entire grantmaking process through an ALICE (Asset-Limited, Income-Constrained, Employed) framework. United Way asks in its grant application how the partner observes equity within their organization. Since 2016, United Way also requests that their partners collect demographic data on their clients to ensure that they are reaching those individuals who need their services most. If they are not reaching those demographics, then United Way can help them do so.

United Way works hard to highlight the intersections of each category, recognizing that a priority like meeting basic needs intersects with achieving financial stability, a goal that can also directly intersect with education, and health.

Efforts to Fund BIPOC-led Organizations

In 2019, United Way sent out a survey to their funded partners with a request for demographic data on their Executive Directors. Seeking this information was this United Way's next step in holding itself accountable when it comes to funding decisions, recognizing that Black, Indigenous, and people-of-color (BIPOC)-led organizations tend to be underfunded, if funded at all

United Way also sought demographic information for the Program Leads of its partners. United Way staff know that while nonprofits may be led by white people, the program staff, especially those who engage with the community

frequently, tend to be BIPOC and bear the brunt of the work. This data is part of United Way’s ongoing effort to examine its grant making process to determine how United Way could be perpetuating white supremacy just by who it funds.



CORE COMPONENTS OF UNITED WAY’S RACIAL EQUITY WORK

2016 Grant from the Toyota Foundation

In 2016, United Way Worldwide received a grant from the Toyota Foundation and subsequently disbursed funds to local United Ways, including the United Way of the Battle Creek and Kalamazoo Region. From 2017-2018, their team expanded its equity work, including developing sponsorships of equity-focused local nonprofit organizations and community events.

Truth & Titus (T&T) Collective Partnership

With funding from the Toyota Foundation, United Way partnered with The Truth & Titus Collective (T&T) in Battle Creek, a local collective committed to facilitating equitable transformation at the individual and institutional levels. T&T helps organizations determine how to implement EDI into organizations’ norms and practices, offering training on topics including power and privilege, implicit bias, culture, history, and equitable institutional practices.

T&T 2019 Climate Survey

In 2019, United Way engaged T&T to conduct an EDI climate survey to capture a baseline assessment of how the existing culture of the organization is supporting and/or hindering an equitable and inclusive workplace. The staff survey had an 84% completion rate and found that overall employee satisfaction is very high. Zero percent reported that they were “very dissatisfied” with any of the indicators questioned. The highest rates of satisfaction are with the sense of community and collegiality among staff. Commitment to EDI, sense of belonging, feeling their opinions are respected, and being valued at work all scored more than 80%.

Based on survey results, T&T recognized five key themes: relationships, implicit bias, communication, representation, and leadership development—and provided recommendations for growth and organizational development:

Relationships Among Staff and with the Wider Community

- ▶ Examine individual identities and privilege.
- ▶ Learn to recognize, discuss, and leverage power among staff and as an organization.

Implicit Bias and Microaggressions

- ▶ Define microaggressions and learn interventions.
- ▶ Ensure the full staff develops an understanding of microaggressions and their relationship to institutional and systemic oppression.

Clear Communication of EDI Internally and Externally

- ▶ Develop a shared understanding of EDI as an organization.
- ▶ Revisit, refine, and communicate EDI grievance process.

Representation

- ▶ Create awareness of community-level demographics and develop strategies to increase representation amongst staff.
- ▶ Provide EDI training/onboarding.
- ▶ Increase diversity of Board & Tier 1 volunteers.

Leadership Development

- ▶ Provide senior leadership with the tools needed to accelerate EDI work internally and externally.
- ▶ Elevate and accelerate the organizational EDI strategic plan work outside of committee-level.
- ▶ Provide mentorship and professional development opportunities more equitably.

All staff trainings at United Way: As of February 2020, T&T has facilitated two full staff trainings around various EDI topics such as communication, implicit bias, microaggressions, developing group culture, and self-care practices. T&T has also helped begin and facilitate race-based caucusing to create spaces for BIPOC staff and white staff to do their own learning and healing.

Employee Coaching: United Way of the Battle Creek and Kalamazoo Region has provided each of its employees an opportunity for one-on-one and group coaching through T&T.

2019 CATALYZING COMMUNITY GIVING (CCG) GRANT

The United Way's partnerships were recently recognized in November 2019, when it received a \$250,000 grant from the W.K. Kellogg Foundation (WKKF) of Battle Creek. The grant is focused on developing philanthropic activity in communities of color. United Way shares WKKF's belief that community impact agencies with funding like it must work alongside communities of color and learn from them to better support their own philanthropic activities. WKKF awards these grants under the belief that too often, charitable agencies come into communities and try to solve problems without engaging with those who understand those problems best.



Launched in 2014 by WKKF, the CCG initiative supports communities of color in using philanthropy to become agents of their own change and positively impact the lives of children and families in their communities. United Way is [one of four cohort members in Michigan](#).

Actions Items for United Way

Between now and August 2022, United Way will receive the grant monies from WKKF and devote them to several specific efforts:

- ▶ An equity audit of United Way's processes for raising and distributing dollars.
- ▶ Hold community engagement training for staff and project partners through the Harwood Institute CCG cohort members.
- ▶ Conduct community conversations in Battle Creek to identify existing philanthropy in communities of color as well as needs.
- ▶ Work alongside those communities as they create new philanthropic initiatives where desired.

- ▶ Provide mini-grants to build fundraising capacity for those new, community-led philanthropic activities in Battle Creek.
- ▶ Match dollars raised by the cohort of community leaders taking part in the Catalyzing Community Giving project.

CCG Grant Goals

With this CCG grant, United Way hopes (1) to boost the financial resources going to communities of color *from* communities of color and (2) see an increase in participation by people of color in how those resources are distributed within their community.

COVID-19 Grant from WKKF

In response to the COVID-19 pandemic, WKKF recently gave \$500,000 to United Way's Disaster Relief Fund. The Disaster Relief Fund proactively supports response and recovery in instances of natural disaster and community crises that affect individuals below the ALICE (Asset-Limited, Income-Constrained, Employed) threshold. Since the pandemic hit, the Fund has supported local relief efforts through 77 Kalamazoo-area agencies, totaling more than \$1.36 million.



WKKF also gave United Way a \$240,000 WKKF Disaster Relief Fund Supplement Grant. Of that \$240,000, the CCG cohort members received \$100,000, which include VOCES, Burma Center, Southwestern Michigan Urban League, RISE, New Level Sports Ministries, Pastor Richard Bailey, Dr. Elishae Johnson, and the A. Philip Randolph Institute of Battle Creek. The agencies will report back on how investments addressed needs.

The CCG cohort also received \$37,500 to support their work after a WKKF conference was cancelled due to COVID-19.

The CCG and United Way Partnership

The CCG initiative supports communities of color through philanthropy, encouraging them to act as “agents of their own change” and to uplift the lives of children and families. The current cohort of 30+ grantees are focused on specific strategic elements over a three-year period (2019 to 2022):

- ▶ *Donor Networks:* Organizing giving circles and administering donor engagement programs.
- ▶ *Research and Outreach:* Conducting research on local or regional philanthropic trends; developing and sharing tools, curricula, guides and trainings for donors, potential donors, and nonprofits.
- ▶ *Building Capacity:* Developing the philanthropic capacity of communities of color; developing online platforms and mobile technologies for fundraising; utilizing evaluation technical assistance.
- ▶ *Engaging in Partnerships and Network Building:* Creating space and time for knowledge sharing and peer learning.

The Business Case for Racial Equity in Michigan

In May 2015, Ani Turner of the Altaram Institute published a [report](#) estimating the benefits of promoting equity and addressing racial and ethnic inequity in Michigan titled “The Business Case for Racial Equity in Michigan.” Turner’s report indicated that if the average person of color achieved the average income of their white counterparts at any age, total Michigan earnings would increase by 7.5 percent or \$16.2 billion (2012 projection). If the earnings gaps were eliminated, the increased earnings would raise the state’s economic output by a comparable percentage for an increase of \$31.2 billion in state GDP.

WKKF has been exploring and advocating for efforts to drive self-directed philanthropy in communities of color for more than 18 years. The Catalyzing Community Giving (CCG) effort seeks to raise philanthropic dollars in communities of color while engaging donors around issues that disproportionately affect vulnerable children and families in those communities.

More About the W.K. Kellogg Foundation

For more than 20 years, WKKF has supported the growth of philanthropy by and for communities of color. The first phase, launched in 1996, increased the understanding of the emerging field of identity-based philanthropy. The second and third phases between 2005 and 2019 grew this field further, building a community of practice among nonprofit leaders and diverse donors throughout the United States.

The Kellogg Foundation has invested more than \$40 million in these efforts since 2005, making it the largest single funder of identity-based funds in the United States.

RENEWED ORGANIZATIONAL STRATEGY



Vision, Mission & Values Alignment

- **UWBCKR Vision:** A vibrant community where all people realize their full potential.
- **UWBCKR Mission:** Drive impact by leading shared efforts that engage diverse people ideas and resources.
- **Core Values:** Integrity, Engagement, Leadership, Accountability, Inclusiveness, Creativity



In the spring of 2020, United Way’s EDI Committee broke into sub-groups to discuss organizational strategy around EDI, and recommended priorities for departments to focus on along with measurable indicators to evaluate future success.

The committee decided on a set of next steps to take to stay in touch with its statement on equity. United Way is committed to building capacity and accountability into its policies, practices, and partnerships through collective collaboration with communities most affected by inequities.

1. Leadership Team (LT) members will be responsible for applying an equity lens to their departmental goals and key performance indicators.
2. A required EDI learning and demonstration of growth will be included in each employee’s annual review process.
3. A United Way Board Liaison will be identified to serve on the EDI Committee and annual Board EDI trainings will be integrated.
4. An analysis of United Way’s hiring process and compensation process will be completed, and results communicated across the organization.
5. A strategic communications plan will be developed to drive shared messaging throughout the organization to authentically engage with their communities and to provide transparency as they seek to center equity at the core of their work.

United Way’s EDI Measurables

To track progress towards reaching its goals in 2020, the United Way defined some measurable indicators:

1. United Way will require departments to submit at least one (1) EDI related goal for their team.
2. All departments will consult with equity partner T&T to develop their strategic plan centering equity.

3. Each team member would be required to engage in at least two external equity-focused trainings per year focusing on their area of expertise.

Bringing in the Community's Voice

United Way is constantly striving to implement participatory grant making in their organization through several ways. Firstly, through volunteer-led review teams that review grant applications and make funding decisions. These review teams are fully comprised of volunteers from different sectors with varied perspectives and life experiences. Additionally, United Way brings community voice into the checks and balances of their Community Impact Team, as their Regional Community Impact Cabinet is comprised of volunteer members. Their role is to approve funding recommendations made by the volunteer impact review teams, as well as any changes regarding grant making processes, extensions, and more. Last but certainly not least, the Catalyzing Community Giving (CCG) Cohort has been a phenomenal way of integrating community voice in United Way's work.

The results have been remarkable so far, both internally and externally:

- ▶ **INTERNALLY:** United Way's conversations with the CCG Cohort have been eye opening, as they help shed light on the exclusion of BIPOC-led organizations by the philanthropic sector. United Way is aware that historically BIPOC-led organizations are underfunded and is trying to disrupt this system of oppression by ensuring that everything from outreach, application, review, to receipt of decision and after, is equitable and that they are channeling resources where they should be – to those who are marginalized. Examples of this intentionality include adding specific questions on Equity, Diversity and Inclusion, and placing weight on those answers during the review, and diversifying their volunteer review teams, and encouraging them to look at applications through a racial equity lens.
- ▶ **EXTERNALLY:** Because United Way is successfully integrating community voice, they are becoming more community focused and open to learning and forging meaningful partnerships that are not transactional in nature. United Way recognizes that their role is to support funders and other organizations along the way by providing technical assistance and other capacity building supports they need to thrive. United Way is taking their learnings from the CCG meetings to other funders, in the hope that they too can look introspectively at their own organizations and identify gaps, and actions to ensure they are equitable as well. The community, including other funders, is recognizing the work of the CCG cohort. They have the power to highlight their impact on their communities, and United Way is excited to see them being recognized, especially during a pandemic that has disproportionately affected the very same population that comprises the CCG cohort.

RACIAL EQUITY AND THE COVID-19 PANDEMIC

In response to COVID-19, United Way placed an increased emphasis on moving resources to BIPOC-led nonprofits and BIPOC-owned businesses. As COVID-19 disproportionately impacted BIPOC neighborhoods, United Way worked diligently to move grants and loans to these organizations as quickly as possible, simplifying its grant application to remove bureaucratic "red tape." This work became an opportunity for United Way to partner with organizations and businesses that it historically had not been able to in its traditional grantmaking process.

Furthermore, after the murders of George Floyd, Ahmaud Arbery, and Breonna Taylor, and the emphasis at the national, state, and local levels, United Way issued a statement condemning these killings and underscoring United Way's commitment to racial equity and social justice.

Internally, the recent protests have provided their team an opportunity to look inward and examine the ways that United Way has historically failed to show up for their community. United Way has begun implementing race-based caucusing at the staff and board level and most recently, made the decision to begin compensating their EDI Committee Chair and Vice Chair positions for their work.

United Way and Kalamazoo Micro-Enterprise Grants (KMEG)

In the last two years, United Way has also steadily bolstered its efforts to support BIPOC- and women-owned businesses. As the country grapples with the COVID-19 pandemic, United Way is working hard to support BIPOC communities by supporting small businesses. Recently, it unveiled a \$500,000 grant program to provide relief to 100 Kalamazoo microbusinesses dealing with the economic effects of the COVID-19 pandemic. Each of the businesses received \$5,000 through the Kalamazoo Micro-Enterprise Grants program, a United Way partnership with the city of Kalamazoo.

Microenterprises, or microbusinesses, are defined as "very small businesses that generate low revenue but bring unique skills and services to the community." Many micro-enterprises are BIPOC-owned and/or women-owned. By awarding these micro grants, United Way hopes to sustain these businesses so they may continue to thrive and grow, even as the country weathers the pandemic.

RESULTS

United Way in 2020 is undergoing an organizational equity audit of internal and external practices and processes. They are using the data they are collecting to improve the way they partner with and support their region. This began with listening more deeply and resisting the urge to prescribe a solution. They have been listening and responding to their region differently. United Way's work is becoming even more community focused as they build authentic relationships and meaningful partnerships, rather than cultivate "sharecroppers" in historically and systemically restrained communities.

The COVID-19 pandemic provided the opportunity to quickly pivot and remove restrictions that typically limit the eligibility of many BIPOC nonprofits and small businesses. United Way was able to deploy necessary resources quickly to the most impacted communities, primarily communities of color. The more streamlined, less restrictive process also unlocked the data requirements. Disaster relief grantees dictated what data they will provide based on what they intended to do with their grant. The only restrictions were based on the requirement that the funds be used for essential COVID-19 related needs and be provided within United Way's service area (as other United Ways have service areas that back up to theirs). As their Disaster Relief Funds have just recently closed as of this writing, United Way does not yet have the data in. Qualitatively, it appears that the changes United Way made to grant more equitably through their initial pandemic response have been impactful.

This is the data United Way is tracking to its progress in its equity work:

INTERNAL:

- ▶ Staff demographics
- ▶ Board demographics
- ▶ Equity professional development
- ▶ Hiring/promotion process

EXTERNAL:

- ▶ United Way has and continues to explore the extent to which their current grant making is equitable according to all the data they have collected from their strategic grant processes.
 - Organization demographics
 - Service population descriptives/demographics (e.g.; race/ethnicity, ALICE statistics - income, household size, residential zip code, age, etc.)
 - Board demographics (new)
 - Program goals

- Goal area outputs (Basic Needs) or outcomes (Health, Education, Income)
- ▶ United Way recently examined, and will continue to monitor:
 - How many BIPOC-led community partners are currently funded; percentage of total funded community partners
 - Grant amounts of BIPOC-led community partners compared to grant amounts of White-led community partners
 - Percentage of ask funded to BIPOC-led community partners
- ▶ United Way hopes to begin exploring any correlations between funding and achievement (based on community aspirations rather than prescribed set of outcomes). They want to learn the extent to which funding community-trusted experts more equitably increases achievement of the community's aspirations. From there, they would like to learn how to invest in their region in a way that intentionally supports the opposite of what systemic inequity was designed to do – self-sustainable communities of color. United Way will use that data to inform how to better invest, partner, and advocate for policies that have a sustainable impact on closing all systems gaps (wealth/power, education, health).

ADVICE FOR UNITED WAYS

For United Ways who want to follow suit, here are some takeaways from United Way of the Battle Creek and Kalamazoo's experience:

Start Internally

- ▶ To "walk the talk" and began to deeply address the systemic barriers preventing every person in every community from achieving their potential, a United Way must look inside its own organization and take steps to examine and address in measurable ways how to create a more equitable United Way. If there isn't someone on the team who has the knowledge or expertise to provide a climate survey with recommended next steps, seek out a professional vendor to partner and provide these services. Making sure that staff members have access to educational resources, coaching, and opportunities to co-develop a shared language is an important first step. If United Ways start doing the work too early and have not taken time to provide staff with these supports, they will encounter roadblocks.

Realize that Equity Is a Journey

- ▶ “It’s not a recipe for the perfect cake.” Equity work is a journey, because there are so many moving parts and intersectionality that is forever evolving based on the individual or group’s level of enlightenment. United Way is learning, changing, and learning from that what to do next. The fact that equity work is so extremely difficult suggests how terribly necessary it is.

Staff and Resource Equity Work Appropriately

- ▶ As the equity work grows, organizations should continuously re-evaluate how the work is being staffed and resourced. At some point United Way of Battle Creek and Kalamazoo Region’s equity work outgrew an internal volunteer-driven committee structure. They are currently working to restructure and resource it in a more sustainable and effective way.

Budget Equity Work Appropriately

- ▶ Ensure there is a budget dedicated to the work that is sustainable. Grant funding is important and helpful in an operations budget, but this work is core to the entire framework and resourcing it that way is vital.

Advice from United Way Worldwide²

- ▶ Achieving United Way’s mission means being an equity leader and striving for outcomes that reflect a more inclusive global society. As we articulate what the Modern United Way looks like, we must:
 - Have a dual focus on operationalizing equity internally and in our community work;
 - Include and prioritize the voices of those most affected;
 - Ensure that decision making is transparent and involves staff and communities who are most affected;
 - Be informed by history and data;
 - Be creative and non-linear;
 - Provide continuous training to refine knowledge, commitment, skills, practice and reflection;

- Acknowledge that successful outcomes will manifest in different forms, including better internal policies, stronger community results, and improved relationships and processes;
- Involve CEOs, board leadership and members, and entire staff; and;
- Be about action as well as talk.
- Integrate an explicit equity lens throughout United Ways’ work/core business practices by employing the six levers: data, community mobilization and engagement; communications and awareness building; fundraising, resource allocation and grantmaking; policy and advocacy; and local capacity building.³



LINKS

- <https://changethestory.org/leading-with-equity/>
- <https://changethestory.org/new-grant-to-catalyze-giving-in-communities-of-color/>
- <https://changethestory.org/micro-enterprise-grants/>
- <https://changethestory.org/micro-enterprise-grants-buoy-100-small-businesses/2019>
- <https://changethestory.org/look-whos-talking-dialogue-reaches-key-milestone-in-battle-creek-beacon-community/>

1. Center for American Progress. 2018. “Exploring African American’ High Maternal and Infant Death Rates.” <https://www.americanprogress.org/issues/early-childhood/reports/2018/02/01/445576/exploring-african-americans-high-maternal-infant-death-rates/>

2. [Living United: A Guide for Becoming a More Equitable Organization](#) ©2019, United Way Worldwide

3. [Strengthening Our Equity Muscle to Accelerate Impact: The United Way Equity Framework](#) ©2020, United Way Worldwide

