



Executive Summary of Discovery Report and Metta Fund Racial Equity Practices

AUGUST 2023



Executive Summary



Over the past few years, Metta Fund's staff and board have been engaged in work to look at systemic racial inequities. In this exploration, the Foundation was assessing how racial inequities impact older adults of color and the organizations that support them. Metta also interrogated what needed to shift in its approach to grantmaking and programming to effectively support the field's capacity to address racial inequities impacting older adults of color.

This report shares what was learned in this assessment and lifts the actions Metta is taking to address gaps in its programmatic approach and in the field.

Through a partnership with Mandala Change Group (MCG), we spoke with BIPOC leaders working with older adults of color in California; this included current grant partners, community-based leaders, and other funders in California. We looked at state and national research on older adults of color. And finally, we assessed Metta's grantmaking and programmatic practices through a racial equity lens. This discovery process yielded a wide range of experiences and specific recommendations for how Metta could shift to meet the needs of older adults experiencing the greatest disparities in aging with dignity.

What We Learned

- Older adults of color are aging at the intersection of multiple identities: race, ethnicity, disability, mental health, nutrition, gender identity, sexual orientation, language access, and economic status which compound the disparities they experience.
- As the demographic of older adults 60+ continues to be the fastest growing population in California, the field of older adult-serving programs and services is still developing an understanding of the nuanced needs and challenges of this population. The need for an opportunity exists to expand the field of those supporting older adults of color and how services and programs are delivered.
- Community-based organizations and leaders are keen on addressing systems change, but cannot sustain their organizing efforts without adequate resources and staffing.

- Older adults of color in San Francisco are disproportionately experiencing inequities as it relates to their overall health and well-being and access to quality care. Of older adults of color in San Francisco, 44% are low-to-moderate income and 28% are below the federal poverty level. According to UCLA's Elder Economic Index, in 2019, the monthly cost of living for older adults in San Francisco, including rent, was \$3,779. This is 47.9% higher than the California average cost of living. A lack of sustainable income is exacerbated by other inequities including mental health, lack of access to quality and reliable transportation, culturally competent health and caregiving services, inadequate access to healthy and nutritious foods, disability access, and access and user education for technology.

For Philanthropy

- Organizations that are led by and embedded in communities of color bring the cultural competency and lived experience to meet the complex needs of elders of color, yet they experience significant capacity and resource gaps due to historical underinvestment. People of color-led and community-based organizations receive 4% of all philanthropic dollars. In 2020, unrestricted net assets of Black-led organizations remained 91% smaller than white-led organizations that focus on the same work.
- Philanthropy continues to assume risk and not trust the leadership of color who deeply understand the racialized lived experience of older adults of color and their communities
- Community-based organizations led by people of color continue to experience boom and bust cycles of investment contributing to nonprofit starvation cycles and their ability to sustain and grow their work to meet the needs of older adults of color.

For Metta Fund

- The Foundation has been investing deeply in the sustainability and capacity of older adult-serving organizations with general operating support since 2016. There is an opportunity to deepen investment and partnership with organizations that are emerging into the older adult space and are deeply embedded in communities impacted by systemic racism.

- Reporting and applications can be right-sized to ask for a ‘need to have’ versus a ‘nice to have’.
- Metta’s evaluation approach should pivot to include an assessment of the foundation’s impact on racial equity through its approach to grantmaking and programs.
- The learning stance at Metta should be about learning to advance the field of older adult-serving organizations and policy systems that address the root causes of disparities experienced by older adults.
- Metta can create more space and opportunity to center the voice and power of older adults of color.



Metta Fund’s Racial Equity Approach to Close Gaps

The **revised grantmaking criteria** described below are intended to close the gaps on who, what, and how Metta Fund is investing for older adults of color:

- **Invest in the leadership of 51% people of color-led and 75% people of color- serving organizations.** Defining ‘led-by’ as 51% or greater in all total racial and ethnic categories except for white. This includes staff and board who are responsible for making decisions about policy, strategy, and financials.
- **Prioritize emergent older adult serving organizations.** These are organizations with older adult clients but no identified theory or services specific to older adult needs. They are place-based, grassroots organizations that may not have the infrastructure and administration to access government resources or institutional funders.
- **Prioritize areas experiencing service apartheid.** This includes areas of San Francisco with limited older adult programs, services, access to transportation, food, health, and digital services, and experience heightened economic insecurity.

- **Prioritize organizations and programs that have a demonstrated approach of engaging the voice and lived experience of older adults** in decision-making, community advocacy, and program strategy development. For example, organizations that have formal and informal ways for older adults of color to
 - advise staff (advisory body)
 - give feedback (focus groups, surveys)
 - participate as paid staff or volunteer base (board)

Metta Fund will continue to provide **general operating** and **multi-year grants**. In addition to continuing with flexible funding, Metta Fund will expand **multi-year grants** that give organizations and programs emergent in the older adult program and services the opportunity to build out their capacity and sustainability. Additionally, Metta Fund has **increased the floor on its grant size to make more meaningful investments, recognizing the level of commitment needed to support change.**

The foundation is also reimagining how to shift its processes to be more aligned with racial equity grantmaking. Paramount to equitable practice is reducing burden. Therefore, Metta Fund will continue its current practice of partnering closely with organizations while reducing their administrative requirements.

Impact and Learning

We are committed to learning from our efforts in pursuit of impact and equity. Metta Fund's program team is currently working with an evaluation consultant, Learning for Action (LFA), to reassess its learning and evaluation practices in addition to reporting formats. The goal is that this work will result in a more streamlined and less onerous process with a focus on lifting up effective practices and strategies from grant partners' learning.



Metta as Convenor and Capacity Builder: Going Beyond the Grant

We understand that supporting our grant partners goes beyond the grant payment. With input from the field and the community, Metta Fund will continue to design around its role as convenor and capacity builder. In that vein, we will leverage all our resources - including access to our conference space, training, and technical assistance - ensuring they are culturally competent, fully accessible, and support systems change.

The following tenants will guide our development of convening and capacity building:



Accessibility - offerings are inclusive and accessible to community-based organizations and leaders. This includes consideration for accessibility based on disabilities, language, time of day, safety, transportation, and location.



Proximate Leadership - individuals and organizations invited or contracted to be facilitators, trainers, experts, and designers are representative of the diverse population of older adults in San Francisco.



Responsive - ideas for content and the delivery of offerings are in direct response to community interest and informed by older adults of color.

An important racial equity practice is to have participatory processes that engage the lived experience and perspectives of impacted communities. In that vein, Metta Fund will design a practice to have an **advisory body** to engage community voice to inform our practices.