Metta Fund™

Mandala Change Group

Discovery Report and Metta Fund Racial Equity Practices

AUGUST 2023

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Preface

Metta Fund seeks to improve the health and wellbeing of San Francisco's older adult population and envisions inclusive communities where all can thrive and age with dignity and joy. Yet, we are continually reminded that racism is a formidable obstacle to that mission. Elders of color face barriers in accessing the care they need and suffer health disparities that impact their quality of life.

In response to the growing needs of our rapidly aging region, in 2021, Metta Fund announced a refreshed mission and vision along with a formal racial equity commitment as a means of expanding and accelerating the impact of our grantmaking. Leaning into this commitment, in 2022, we engaged Mandala Change Group (MCG) to guide our team in the development of race-centered grantmaking practices.

This discovery and realignment work took place between April 2022 and July 2023. During that time, we examined community conditions, progress toward our goals, and adjustments that needed to be made to integrate racial equity more explicitly into our strategies.

Because we believe philanthropy has a role to play in advancing racial equity, we recently announced strategic shifts in our grantmaking practices and strategies that were born out of this year-long engagement. This report provides background and findings and lays out refined practices intended to focus Metta Fund's grantmaking strategy on elders of color.

Acknowledgments

Metta Fund gratefully acknowledges Maya Thornell-Sandifor of Mandala Change Group for guiding this process and providing her expertise in the development of our new racial equity practices. She was instrumental in our internal learning while helping us develop processes rooted in equity. Additional thanks to Greg Hodge of Khepera Consulting for overseeing Metta Fund's initial racial equity learning, laying the foundation for this focused work. We would also like to express our gratitude to all those grant and community partners who participated in the discovery work by engaging in surveys and interviews with Mandala Change Group and Metta Fund staff. Lastly, we are grateful to Metta Fund's board for consistently standing alongside our team on this journey.

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.

Introduction

Approach and Methodology

In this discovery and analysis, we are focusing on older adults of color in San Francisco and their experience with caregiving as well as social isolation and loneliness. We are using the social determinants of health framing with the understanding that social and environmental conditions are impacted by institutionalized and systemic oppression, including racism. While this work centers on racial inequities, we also acknowledge that older adults in San Francisco and throughout California live at the intersection of multiple identities and are therefore impacted by a combination of systems of oppression including racism, ageism, ableism, sexism, capitalism, white supremacy, heterosexism, xenophobia, and transphobia.

As part of this discovery, we surveyed Metta Fund's current grant partners [n= 27] and conducted interviews [n= 19] with funders, community-based organizations, staff at the city of San Francisco, and members of Metta Fund's board of directors. In addition, documents provided by Metta Fund and the City of San Francisco Department of Disability and Aging Services (DAS) were reviewed. Community-based organizations participating in the interviews received a stipend of $125 for their time. All participants were offered anonymity.

One of the distinctions between survey respondents (current grant partners) and interview participants (not current grant partners) is that the latter group is majority people of color-led and serving organizations. These organizations are rooted in the communities they serve and bring a deep understanding and cultural competency around the needs and barriers of older adults of color. This is different from survey respondents, half of whom named as a challenge needing a "deeper understanding of the specific needs and barriers for older adults of color."

Areas of Inquiry

Six key areas of inquiry included the following:

- Specific health equity needs and experiences of older adults of color related to a) caregiving and b) social isolation & loneliness

- Challenges that nonprofit and community-based organizations face serving older adults of color

- Systemic issues impacting older adults of color in San Francisco

- Operational and capacity-building functions within community-based organizations that go unfunded or are underfunded and which inhibit their ability to be responsive to the needs of older adults of color

- Lingering impacts from COVID-19 on older adults of color and on organizations serving/benefitting older adults of color

- Grant partners' experience of Metta Fund's grantmaking and programmatic practices

This report organizes themes from the discovery process around the experience of older adults of color and the organizations that support them. As we hold the social determinants of health -- economic stability, neighborhood and environment, transportation, education, food, community and social context, and health care system -- we think about the determinants in the context of place, San Francisco, and the lives of older adults. The practices we are putting forward at the end of the report take into consideration the findings from our discovery and the understanding that:

a) the health and wellness of older adults are largely determined by social and environmental conditions

b) historical and systemic racism and racial and ethnic discrimination are deeply connected to why older adults of color experience significant inequities related to their health and wellbeing

c) to address racial inequities for older adults the systems of care, including health care and caregiving, need to invest in comprehensive social care that prioritizes quality over quantity and considers culturally responsive practices over one-size fit all approaches.

We are also seeking to understand -- through the lived experience of organizations led by and serving older adults of color -- the factors which contribute to greater disparities in accessing[1] quality caregiving and increased social isolation and loneliness. Metta Fund is interested in which community-led models, if invested in, could improve health care systems and advance racial equity for older adults.

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[1] In the United States, older adults of color have long experienced a plethora of intersecting challenges and inequities that make them more susceptible to poor outcomes across all aspects of life.
https://generations.asaging.org/reimagining-and-transforming-long-term-care

Gaps and Opportunities - Themes from Discovery

The population of older adults in San Francisco is estimated to be 185,000 adults 60 and older, 60% of whom are people of color with low-to-moderate income (44%) or below the federal poverty level (28%).[2] Unsurprisingly, elders of color in San Francisco are disproportionately experiencing inequities as it relates to their overall health and well-being and access to quality care. It is important to note that inequities result from systemic and institutional racism -- inequities that were and continue to be exacerbated by COVID-19. As one interviewee articulated, elders of color are: "...entering older age in worse health conditions than their white counterparts. Needs for support are heightened because of structural racism within the American health care system."

Elders of color at the intersection of multiple forms of oppression (e.g. low or no income, LGBTQ, disabled, refugee, or migrant) often experience fears, safety concerns, discrimination, and/or bias while accessing programs and services. There is not a single issue that results in their experience with social isolation or access to quality and affordable care. Instead, there is a confluence of intersectional issues that severely limit or prevent older adults of color from being able to age with grace and dignity including but not limited to economic security, food insecurity, transportation, safety, language access, and program/services eligibility.

> "The system is broken and can be improved. For example, the process of doctor approval for hours of support is biased and affects whether or not folks can get in-home services. These biases are especially playing out for older Black adults who are consistently assessed for needing fewer hours."

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[2] https://www.sfhsa.org/sites/default/files/Report_SF%20DAS_DFCNA%202021-22%2004012022.pdf

"When health disparities of BIPOC communities are discussed, it's with a broad stroke and not nuanced and that's been a big disservice to all of us. When we talk about access to health services we talk about when individuals come to the doors of health care institutions and that's not always possible for our communities because of issues like transportation. There is not a big focus on community-based health care and providers in every neighborhood so that we are making care more accessible, bringing the care to people instead of requiring them to navigate public transportation, lack of translators, online navigation that is not in their language. For example, more support for things like Promotoras in the Latino/x community."

Economic Insecurity

The racial wealth gap impacts people's ability to age with options. White Americans hold 84% of total U.S. wealth but make up only 60% of the population—while Black Americans hold 4% of the wealth and make up 13% of the population.[3] Overall, median per capita income for older White adults was about one and a half times higher than for older Black adults and over two times higher than for older Hispanic adults.[4] According to the 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. This wealth gap -- exacerbated by systemic racism over a lifetime -- means older adults of color have limited choices in terms of access to quality housing, caregiving, and health services; and no financial cushion to recover from major health or long-term care expenses. Older adults who own property, sometimes referred to as the "hidden poor" often believe they don't qualify for services because they have assets even if they are living at or below the poverty line.

[3] https://www.minneapolisfed.org/article/2022/how-the-racial-wealth-gap-has-evolved-and-why-it-persists#:~:text=It%20matters%20a%20great%20deal,13%20percent%20of%20the%20population

[4] https://www.kff.org/medicare/issue-brief/does-education-narrow-the-gap-in-wealth-among-older-adults-by-race-and-ethnicity/

While the cost of living in San Francisco continues to be a burden, older adults of color don't want to be displaced from the only communities and families they know and worry they won't find affordable housing options in the Bay Area. Older adults of color who don't have retirement funds or savings are without the income to be economically secure. And even if they can work there are very few opportunities for older adults to earn supplemental income.

Some organizations have voiced notions around developing opportunities to compensate older adults.

> "Seniors can continue to play a vital role in our communities - our elders have wisdom, and life lessons that are important to us. We have not found good ways to bring that value and find healthy ways to include that in a way that compensates seniors and gives them purpose and stature in the community versus something that just turns people out to pasture."

Neighborhood and Physical Environment

Geographic location is significant to elders' ability to access programs and services. Elders with access to safe transportation, grocery stores, the faith-based community, and service centers are less isolated and more apt to take advantage of older adult services. But in the case of accessing programs and services - zip code is a factor exacerbated by technology barriers, transportation access, and physical and social isolation.

Transportation

Access to reliable public transportation and paratransit is wholly dependent on location. For elders who live in hilly parts of the city – like Bayview Hunters Point, or non-central locations, like the Sunset – access to transportation is limited, unreliable, and time consuming, and often exacerbates isolation. Even if transportation is available, walking to and from transportation and navigating transitions can be physically challenging and dangerous, especially for elders with disabilities.

> "Bayview because of the topography of the hills, there is social isolation. People get stuck on the hills. There's no way to quickly get them out of their homes, public transit is still not the best, and there are still pockets of the city where older folks are completely isolated."

Public Safety

Particularly amongst Asian older adults, many of whom have witnessed the victimization of members of their community to hate crimes during COVID-19, there is a significant fear of returning to public spaces. The return to in-person programming and services has been slow and many elders have become even more isolated from their peers and communities. While many programs had to pivot to virtual programming during COVID-19, program and service providers believe it doesn't offer the same benefits for socialization and belonging as in-person programming and services. In addition, one interviewee further shared their concerns that continued racial rhetoric in conservative Asian media has stoked fears and pitted Black and Brown communities against each other.

For immigrant and migrant older adults, programs and service providers are up against a real fear these individuals have of themselves or family members being tracked and deported. This fear causes them to further self-isolate instead of seeking out the care and support they need.

> "Immigration is a big challenge, particularly for indigenous older adults who are reluctant to go out and identify resources for fear of deportation. They remain very isolated. Through our networks, we try to find people and reach out, but fear of ICE and family deportation is really high."

Organizations say resources to create counter-narratives that debunk myths and hate language would be a worthwhile investment.

Older adults of color are more likely to show up for and engage in programming and services when they feel safe and seen by staff and programs that understand the nuances of their unique needs based on racial and ethnic identity.

> "For Latino and Black clients, building trust seems to be more difficult because of past traumas. It comes up a lot from the home care providers that they experience this real resistance to being trusted. Train our home care providers on being willing to take the time to really build trust. What are the things you can do to break down that exterior wall that some older adults of color have. Showing them you are here to help in the best way I can."

Older adults of color in San Francisco articulate that they do not receive adequate information about available resources. Many believe they are ineligible for services because of age, income, and immigration status. If they can navigate challenging application processes, services are often full, or they're placed on a waiting list. For example, in DAS' **Listening Sessions with Communities of Color**, low-to-mid income consumers who do not qualify for Medi-Cal and are unable to cover the prohibitive costs of private care, may be eligible for subsidized in-home care alternatives. However, these consumers expressed frustration that these high-demand programs were often inaccessible due to lengthy waitlists.

Technology access is critically important, as we know. During the pandemic, technology use became a challenge as older adults had trouble setting up online appointments and navigating online systems. Navigating new technology is "like having books on a shelf you can't read" said one funder.

Older adults who choose or need to stay at home and receive services remotely require technology devices, access, and ongoing training. And as organizations continue to operate in this hybrid model, staff needs resources and training to support hybrid service delivery.

Food Insecurity

Four of the top five programs with the highest participation rates among older adults in San Francisco are related to nutrition and food. Across racial and ethnic demographic categories, older adults of color in San Francisco have a high access rate for food and meal programs and specifically attribute the existence of communal dining programs as beneficial for their socialization. Black older adults participate in congregate meals at 1.5 times the rate of the overall older adult population in San Francisco.[5] And API older adults participate at 1.2 times the rate of older adult participants overall.

As one community leader articulated, food is not just about food when it comes to older adults, it is also about the nutritional value of food and how the lack of access to nutritious and healthy food contributes to disproportionate chronic illness and disease for older adults of color.

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[5] https://www.sfhsa.org/sites/default/files/Report_SF%20DAS_DFCNA%202021-22%2004012022.pdf

> "...70% of older adults of color have high blood pressure. Half of them have diabetes. One third have heart disease. Average about 65 years of age. When you ask them about their biggest concerns, food is at the top along with housing."

Older adult programs and services that understand the cultural relevance of food and nutrition including non-traditional medicine and healing practices are critical to support for older adults of color.

In the DAS Listening Session Report[6] it was noted that the participants saw expanded food services available during the height of COVID-19 these culturally inclusive service models offered them a greater degree of dignity, variety, and choice. They expressed a desire for these services to continue.

Important to note when it comes to high quantity food provision programs, a handful of the leaders of color were critical of the quality of the food those programs offer.

> "These programs don't provide quality foods. They are high in sodium, not nutrient-dense quality food. We are talking about food that is $2 per meal. We may be serving smaller numbers, but we're providing high-end quality, nutritious food to seniors and families."

[6] https://www.sfhsa.org/sites/default/files/Report_SFDAS%20BIPOC%20Community%20Listening%20Sessions%20Project%20October%202021.pdf

Cultural Responsiveness

In addition to creating opportunities for social connection and experiences that are culturally relevant, incorporate language access, and where elders feel safe – keeping older adults of color in the communities where they have deep connections to family and friends may reduce social isolation and loneliness. But in some historic neighborhoods like the Mission District and Fillmore, elders of color are getting displaced by gentrification and the high cost of rent in the Bay Area.

> "Twenty years ago, the Latino community used to be centralized in the Mission. But prices have gone up so much in the Mission that a lot of our community members have moved to the Tenderloin and Excelsior. Accessibility to basic needs and services is harder in the Mission. The Mission continues to be a place where Latino community has a sense of belonging, but the affordability and quality of life is an issue."

In terms of caregiving, in families of color who are already experiencing economic and social stressors, unpaid caregiving usually falls to one or two family members who don't get respite care. Leaders of color say their communities could benefit from long-term care education earlier in the life cycle so they can prepare and not put off the caregiving plan until it is an emergency.

Compared to their White peers, older adults of color are more likely to be cared for by family and friends who report experiencing greater financial, physical, and emotional burdens of caregiving due to a myriad of factors, including lower household incomes and higher intensity care situations.[7]

Older adults of color are often on both ends of the caregiving spectrum, as they can be caregivers themselves and in need of care. To that end, we see programs trying a multi-generational approach including meal services, reading programs, and exercise programs that include older adults and youth.

[7] AARP and National Alliance for Caregiving, 2020; Skufca & Rainville, 2021.

"" "We haven't properly explored funding generational programs, or projects that highlight and work with bringing seniors and young people together. [But we have] seen a lot of benefits to both but no funding sources for them so they don't last. Helping out in so many ways - mental, physical, and emotional especially when those groups are in need of connection - young people who are getting in trouble it's also because they don't feel connected." ""

Characteristics of cultural competency of programs and services for older adults include:

- Older adult care providers that can speak to older Latinx and Asian adults in their first language or who provide translation services

- Older adult programs and services that know how to approach taboo topics with cultural sensitivity - finances, politics, gender dynamics, and ageism

- Older adult care and service providers with competency in trauma-informed care

- Older adult programs that have experience working at the intersection of identities including people of color, LGTBQ, and disabled older adults

Language Equity

Language barriers are particularly prevalent for older adults of color who because of lack of translation support often don't know what they're eligible for, have trouble navigating the bureaucracy of paperwork and digital platforms, and don't have someone who can advocate for their needs in their primary language. While many of the programs we spoke to have some staff that speak the languages of the populations they serve, they say it is challenging to find and retain individuals who are multilingual in the current job market.

> "Caregivers are doing literal translations on medical care for older adults. Imagine how wrong that can go if an older adult has multiple medications or post-medical care procedures, but all of the instruction is in English."

Organizations say they must provide significant support to help elders understand eligibility requirements and navigate the appropriate programs and services. This is particularly a challenge for undocumented immigrant and migrant older adults who are challenged by both language and a lack of understanding of what programs they are eligible for as well as fear of deportation if they participate, given their citizenship status.

Older Adult Serving Organizations' Capacity

Metta Fund seeks to understand organizations' capacity needs as it relates to organizational culture, serving older adults of color, and impacts of COVID-19. The following are themes we heard across our conversations and the survey.

Organizations' Capacity for Racial Equity

Grant partners that responded to the survey question of capacity to advance racial equity for the older adult population were split with 33% saying they are emergent [committed but still in early learning], 22% intermediate [shared understanding beginning to a apply a racial equity lens] and 44% active [consistently applying a racial equity lens to programs/services].

Additionally, grant partners consistently identified what they thought would facilitate racial equity in their internal work, including:

- Bringing a racial equity analysis into policies and practices (54%)

- Recruiting and retaining Black, Indigenous, people of color leadership to staff and board (54%)

- Engaging the communities of color (58%)

- Foundational and historical understanding of racial equity (31%)

- Navigating organizational culture including bias, racism, and inclusion (46%)

And what would help grant partners further advance racial equity in their external programs/services:

- A deeper understanding of the specific needs and barriers of older adults of color (54%)

- Capacity to develop and deliver culturally specific services or programs (58%)

- Bilingual program/services staff (54%)

- More staff that reflect the population of older adults of color (54%)

- Physical spaces in communities of color (25%)

In terms of representation and proximate leadership[8], of the current Metta Fund grant partners [N-29], 38% are majority people of color staff-led[9] and 48% are majority people of color board members. While more than half (55%) are serving a majority older adults of color.

Organizations' Workforce Capacity

Participants were highly aware of the specific caregiving needs and risks of social isolation and loneliness for older adults of color. Yet workforce needs were also a prevalent theme in interview conversations, as respondents noted that they lacked the staffing and operational capacity to fully meet those needs. Both in the survey and interviews, organizations cited that the capacity to provide competitive wages for the high cost of living in the Bay Area is a significant barrier to recruiting and retaining culturally competent staff of color. Community-based organizations also compete with the City of San Francisco for qualified and competent talent, where the city can offer more competitive wages and benefits.

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[8] "proximate leader," someone who has a meaningful relationship with groups whose identity, experience, or community are systemically stereotyped, feared, dismissed, or marginalized.
https://ssir.org/articles/entry/effective_change_requires_proximate_leaders#
[9] Note the 38% represents all staff at all role levels. Later in the practice section we distinguish between ALL staff and staff leadership.

"I think many of our orgs know what they'd like to do, but funding is very sparse for doing so. For example, a priority of ours is bringing staff salaries to market rates, so that our staff (who are POC, and LGBTQ+) can take better care of themselves and stay in this work longer."

"We are having a terrible time recruiting Community Health clinicians. We can't compete with the big clinics in terms of what they pay. But language, and accessibility issues, are things the big institutions don't address."

"Ongoing comprehensive training and professional development for staff and home care providers are a necessity. We need the capacity to market and go after the type of talent that it takes to fulfill the roles. The state has to see the caregiving industry as one of the most underfunded and underappreciated sectors, but one that needs the most assistance."

Organizations' Capacity for Systems Change

Many of the older adult-serving organizations we spoke with are already engaged in advocacy work for systems change and sitting at tables with peer organizations to do this work. However, there are a few areas of capacity need that came up in both the survey responses and the interviews. The first need is around how to engage constituents, specifically older adults, in advocacy efforts. Some of the challenges organizations named as barriers to engaging constituents included language barriers, cultural conditioning [some communities conditioned not to speak up for their needs], and safety issues [particularly for undocumented older adults]. Organizations are very interested in collaborating with peers on collective advocacy efforts but said staff time to participate in organizing is very limited and under-resourced. Relatedly, the capacity to collect data specific to elders' experiences and the use of that data to advance systems change was a topic raised.

"Trying to shift folks' mindsets on how politics, racism, and systems are oppressive forces is also our responsibility, that's been a really hard shift for staff to make. I can do it individually, but for all of us to take part that's the individual learning and awakening that needs to happen. We need individual learning… We need the lens to look at our systems and what role we play in oppression and racism and then to the level of what role we can plan in advocacy."

"It's not just elevating and engaging voices from the community but helping to organize the voices from an advocacy standpoint/education standpoint. These voices need to be heard but also do something with that so there could be some shift in power. Folks are happy to engage but need to understand how powerful their voices really are and can be."

Older Adult Organizations - What is Underfunded or Not Funded

We already know that people of color-led and serving organizations are grossly underfunded. Notably, only 1.3% of racial equity funding and 9.1% of racial justice funding supported grassroots organizing.[10] Additionally, more than a third of the top 20 racial equity grant recipients from 2015 through 2018 are organizations that were launched and driven by white business leaders advancing their theories of change for Black and Brown communities.

Many people of color-led and serving organizations we interviewed do not have access to institutional funders, or city/county funding and the majority are not grant partners of Metta Fund. However, these organizations are trusted by elders of color, are culturally competent, and are increasingly meeting the basic needs of elders of color, particularly in response to the pandemic.

There are two consistent themes when it comes to what is underfunded or unfunded: infrastructure and operations. In the survey results, fundraising (48%), strengthening organizational culture (48%), and organizational change management (52%) received the highest responses on capacity-building support.

In the interviews, the focus was on staffing and the need for sustainable funding to be able to hire and retain quality staff. Respondents also wanted to be able to invest in professionalizing the field of older adults and care providers, with adequate training and standards of competency.

COVID-19 Impacts

Participants also said that during COVID-19 they had to shift some priorities to provide mutual aid that would meet older adults' basic needs. Organizations highlighted how important and valuable it was for them to have flexible and rapid response funding, allowing them to step in and provide rapid support for things like food, housing, and mental health services. However, as COVID-19 resources have dried up, the need for necessities has not, and organizations continue to struggle to keep up with that demand.

[10] Philanthropic Institute for Racial Equity, Mismatched Report, https://racialequity.org/mismatched/

"There is still a lot of uncertainty around financing and people needing help with basic needs - food, rent, utilities, access to medical devices, and diapers for children. And now that we're not in the thick of COVID, there are fewer resources to support these basic needs."

"There is a real perception among older adults post-COVID of what they can and can't do anymore, and then add that to the physical and social decline over three years you can't measure it but it's so real. What they're comfortable with their physical ability, mobility, strength, balance, even just their nutrition...the decline is crazy. Folks are starting to come back out, but they're 10 steps back from when COVID started."

"Still a lot of mental health needs that are over the top. Part of that is I think not only the fear of deportation and family separation but the loss of jobs, the fear of eviction, the anxiety that is produced, and not having access to social networks."

Metta Fund's Racial Equity Programmatic Practices

Over the past year, we have deeply examined Metta Fund's grantmaking approach and programmatic strategy. It is our goal that with a deeper racial equity lens, our grantmaking will strengthen the organizations to meet the needs of elders of color. We reviewed who were investing in [organizations and leadership], our grantmaking processes –including application proposals, reporting, and decision making – and Metta Fund's approach to convening, capacity building, and learning.

The racial equity practices we have developed are intended to use the Foundation's resources and influence to impact change more effectively. We are mindful that racial equity work is evolving and continuous and that this is the activation of Metta's commitment.

As we develop these practices, Metta Fund recognizes that the work is intersectional and a departure from previous, more linear approaches. With this intersectional strategy, Metta Fund will prioritize the power of relationships both in its grantmaking and beyond the grant. To elevate a recent quote from the 2023 Association of Black Foundation Executives National Conference: **"Relationship is the revolution!"**

Programmatic Strategies

Power for Now: Deliver person-centered programs and outreach and engage community voice in advocacy and storytelling.
Metta Fund provides general operating to address the most pressing issues, including supporting strong caregiving jobs and developing models to interrupt social isolation and loneliness in elders.

**Power for Later: Build internal organizational capacity.**
Metta Fund provides multi-year grants and flexible funding to ensure community-based organizations can focus on what they need to develop their organizations and staff. Recognizing that community-based organizations, especially people of color-led organizations, have historically been underfunded to build, strengthen, and sustain their organizations.

Power for Change: Strengthen advocacy efforts and organize for systems change.
We commit to utilizing Metta Fund's convening power and influence as a funder, to challenge the inequities that exist in systems and institutions that prevent older adults from aging with dignity. We support our partners' participation in all levels of advocacy from influencing decision makers to shifting policy.

Power of Relationships: Building Trust and Strengthening Community Engagement.
We commit to building trusting relationships with the community by being conscious of our power and privilege as a funder. As we strive for equitable participatory engagement and authentic community voice, we will leverage opportunities to convene and connect to continue to develop authentic relationships with our partners.

Power for *Change*

Power of *Relationship*

Power for *Now*

Power for *Later*
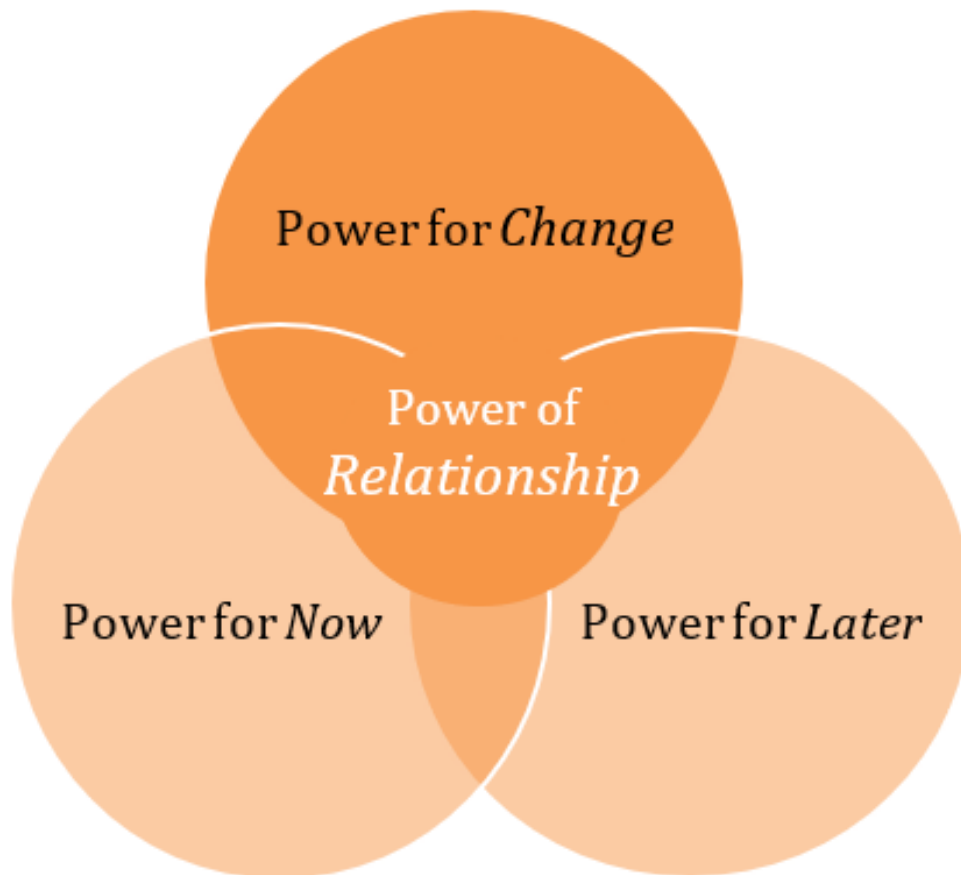
Outlined in this section are the racial equity practices that Metta Fund will incorporate in its role as grantmaker, convenor, capacity builder, and in its influence on collective action. For a detailed view of our racial equity purpose, outcomes, principles, and programmatic strategy, see appendix A.

Metta Fund as Grantmaker

According to a recent report on equitable grantmaking, organizations led by people of color receive only 4% of all philanthropic dollars, and only about 9% of grantmaking from foundations goes to communities of color. And in 2020, the unrestricted net assets of Black-led organizations remained 91% smaller than white-led organizations that focus on the same work.[11] In developing Metta Fund's revised practices, it was important to start with an understanding of the gaps in funding for people of color-led and serving organizations in Metta Fund's portfolio and in the funding space of older adults.

Metta Fund had previously collected detailed demographic data on race and ethnicity for populations served by grant partners and knew that the organizations were serving majority older adults of color (55%). However, Metta Fund did not have the same level of detailed data for who was leading grant partner organizations, instead they had a broad question on staff and board demographic composition. After taking a step to collect more nuanced demographic data including leadership defined as board and staff that make decisions on policy, finances and strategy, Metta Fund learned that only 38% of current grant partners were people of color majority staff-led and 48% had people of color majority boards.

In addition, the team understood qualitatively that a good number of our grant partners were of the size and capacity to access public funding from DAS. This meant there was an opportunity for Metta Fund to be more intentional about investing in organizations that were not currently in their portfolio, but that have proximate leadership to older adults of color and communities of color AND to support those organizations capacity to grow and sustain services and programs for older adults of color.

In addition to understanding leadership gaps, we looked at some of the other disparities impacting elders of color that would inform prioritization in Metta Fund's grantmaking practice. From the discovery process, we understood there were pockets of San Francisco where elders had less access to programs and services because of a combination of factors including: programs were not located in those neighborhoods, inaccessible transportation, and high rates of poverty. One theme that came up regardless of neighborhood or groups served is food insecurity — the lack of access to quality, culturally significant, and nutritious food. Lastly, we knew that investment and strategy decisions informed by those most impacted lead to effective and sustainable solutions.

[11] https://justfund.us/wp-content/uploads/2021/09/JustFund-equitable-grantmaking.pdf

And the importance of ensuring that organizations and programs that serve older adults have mechanisms to engage the experience and perspective of the constituents they serve to be responsive to their needs in ways that are culturally competent.

The following criteria 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 & ethnic categories except for white. And staff and board that is responsible for making decisions about policy, strategy, and financials.

- **Prioritize emergent older adult serving organizations.** These are organizations who have older adults as clients and do not have an identified theory or services that are specific to older adult needs. Grassroots organizations that are place-based but may not have infrastructure and administration to access government resources or institutional funders.

- **Prioritize regions 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 to engage 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 is in the process of building relationships with potential new grant partners that meet the above criteria and will continue to fund existing grant partners that meet these prioritized criteria.

The Foundation already provides **general operating** and **multi-year grants** and will continue in that practice. 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. The multi-year commitment will start with a minimum of two to three years with the goal of increasing to three to five years

commitment over time. Three to five years is in line with the timeframe most nonprofit organizations follow for strategic plan implementation. 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 and increasing access to funding, particularly for organizations that have historically been underinvested in by philanthropy. Metta Fund will continue its current practice of partnering closely with organizations while reducing their administrative requirements, making the process less burdensome.

Removing Bias

Philanthropy has a pattern of considering people of color-led and serving and emergent organizations as 'risky' - the barometer for who is a risky organization and who is not is often laden with bias. Metta Fund will be thoughtful about checking for bias as it considers which organizations the staff develops relationships with and then invites for funding. Areas of consideration will include looking at potential partners through a strengths-based versus deficit-based lens, weighting cultural competency, and continuing to consider historical inequities in funding. The team will also pay attention to groups that are led by and serving racial and ethnic communities that are perpetually underfunded and underrepresented in grantmaking portfolios.

Impact and Learning

Metta Fund is currently working with an evaluation consultant, Learning for Action (LFA), to reassess its learning and evaluation practices and reporting formats. This work will result in a more streamlined and less onerous process with a focus of lifting up effective practices and strategies for the purpose of grant partners' and field learning. Metta Fund will gather information from grant partners as an opportunity for cross learning and to better understand what strategies address root causes of disparities for older adults of color. One of the goals will be to lift up effective practices across the portfolio so that grant partners can learn from one another. As Metta Fund program staff continues their work with LFA focused on racial equity evaluation, we will reimagine what our information gathering and reporting structure might look like as we continue to lead with equitable practices.

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. While we do not have the capacity to meet all needs, we will use our influence and relationships to leverage Metta Fund's resources with other funders and partners.

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. The advisory body will help center the needs and opportunities of communities disproportionately impacted by inequities. Members of the advisory body will be recruited from the San Francisco community and provided stipends for their time and participation.

Ongoing Areas of Consideration

We understand that racial equity practice is continuous work and that we will not resolve all our aspirations for program and operation through this singular design process. While all the practices above were informed by the experiences of stakeholders and leaders in communities of color, there are some lingering questions and nuanced challenges that we hope to tackle in deeper reflection and partnership with leaders working with and for older adults of color. The following is an articulation of the areas we are continuing to explore through this work:

How do we create space to support convening and collaboration that is not forced, burdensome, or overly laborious for our partners?

We are aware that the community has frequently experienced funders being directive in how, what, and with whom grant partners should be in collaboration and community. Sometimes the timing and design of these engagements create additional labor and burden. In our approach to offering physical and time space to be in thought partnership, build relationships, and co-create with one another, we want to be intentional about following their lead. This means continuing to have conversations with partners about how we can add value and be non-duplicative.

What might it look like to support field-building and infrastructure development that builds on organizations' existing strengths and competencies?

Early childhood and youth development as fields have had the benefit of long and deep investment by philanthropy. As a result, organizations that work with these populations have access to a plethora of codified practices, training, frameworks, and networks that have been developed in service of strengthening the field and the organizations that work in them. At the other end of the care continuum, organizations providing services and programming for older adults have not benefited from that same field-building investment. **Less than 1% of philanthropic dollars goes to causes related to aging.**[12]

Despite this stark underinvestment by philanthropy, we also know that organizations led by people of color that have traditionally served children and families are culturally competent, resilient, and responsive to community needs. These organizations are also seeing an increase in elders coming for programs and services. In California, the population aged 60 years and over is expected to grow more than three times as fast as the total population. San Francisco has one of the highest growth rates of older adults in the state, with a recent and anticipated growth rate of 150-199.9% between 2010-2060.[13]

We are interested in supporting organizations to replicate what's working by sharing learning across organizations and building on their core competencies. In our shift to a learning stance that is outward facing, we want to be intentional about how we take in and curate resources for learning and then share those out to the field. This means being in a deep learning stance where we proactively engage our partners in discussion about what's working, what's not working, and what they need to serve elders of color and change the systems that create disparities for this population.

[12] https://www.forbes.com/sites/nextavenue/2019/09/11/why-its-time-for-more-big-foundations-to-fund-aging/?sh=150c2f702a36
[13] https://aging.ca.gov/Data_and_Reports/Facts_About_California's_Elderly/

How might we de-silo the field, knowing that not all organizations and leaders have had a seat at the table, especially those who have been historically underinvested in?

Metta Fund is aware that many elder-serving organizations have deep relationships and are in coalitions and/or other advocacy efforts for systems change. However, we also know organizations historically underinvested in often have the will and interest, but not the capacity and staffing to engage in collective action resulting in not always having a seat at the table. Philanthropy has often contributed to the siloing of organizations by thinking about organizations as single-issue or strategy-focus. Organizations that are led by and working in communities of color are usually addressing a multitude of issues depending on the social, political, and environmental context and intersectional identities of their constituents. For older adults of color, it's not just addressing ageism –– it is also addressing economic justice, housing justice, transportation justice, racial justice, and health justice. How can Metta Fund support an effort to de-silo the field to ensure that however organizations enter the older adult space, they can have a seat at the table and an opportunity to bring their lived and professional experience to bear on pressing issues of inequity for older adults of color?

Appendix A

Problem Statement
Groups working to address the systemic barriers faced by older adults, particularly older adults of color, in accessing quality caregiving and alleviating social isolation & loneliness do not have adequate resources and capacity to address those barriers or the power to influence social change.

Purpose
Metta Fund seeks to improve the health and wellness of San Francisco's growing older adult population. In order to make meaningful impact and advance equity in aging, we must be both explicit and unequivocal in our long-term commitment to advancing racial equity. To that end, Metta Fund will apply a racial equity lens to shift its internal and external practices to make progress on addressing institutional and systemic racism as barriers to meeting our mission.

Outcomes
- San Francisco POC-led and serving organizations have sustainable capacity and resources to provide culturally relevant programs and services to older adults of color.

- Systems and policies are designed to address the specific gaps in caregiving and social isolation & loneliness experienced by POC older adults.

- Older adults of color are seen and treated as valuable contributors to their communities and invested in to ensure they can age with dignity and have a high quality of life.

Guiding Principles
Community-led: We believe in centering the voice and lived experience of aging older adults of color in communities disproportionately impacted by economic and health inequities that create barriers in their ability to age with dignity.

Intersectionality: We understand that older adults live at the intersection of multiple identities that impact their lives -including race & ethnicity, disability, LGTBQ, income status and language. Therefore solutions to support care and well-being must also work at those intersections.

Systems & Services: We believe it is necessary to invest in both systems change and services in parallel in order to disrupt the status quo infrastructure that continues to inadequately and inefficiently support aging older adults.

Targeted Universalism: We believe that by targeting solutions and investment for older adults who disproportionately and historically experience inequities - all older adults, families and communities will benefit with improved services infrastructure, and care.

Strategies

Power for Now
Deliver person-centered programs and outreach, and engage community voice in advocacy and storytelling

Power of Relationship
Building trust and strengthening community engagement

Power for Later
Build internal organizational capacity

Power for Change
Strengthen advocacy efforts and organize for systems change

Metta Fund™