

Investing in Leaders of Color

Year 1 Evaluation
May 2022-May 2023



Report prepared by MDC, August 2023



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Background

The Investing in Leaders of Color (ILOC) Fellowship is a one-year leadership- and capacity-building initiative to acknowledge and support the work of 12 leaders of color who serve communities of color throughout the Carolinas. Philanthropic partners engage with the cohort in collective learning, mutual mentorship, and relationship building throughout the length of the fellowship.

The overall goals of ILOC are to:

- Open access to networks for leaders of color, thus increasing connections to the philanthropic community.
- Assist funders in understanding new, culturally relevant approaches they will use to help leaders of color gain greater access to resources.
- Shift the relationship paradigm between leaders and funders through matched relationships that will deepen rapport and value of leader expertise while building trust, authenticity, and understanding.
- Deepen investments, connections, and long-term impacts in communities for the organizations led by the cohort's fellows.
- Build new mindsets and ways of working toward co-creating a shared vision of the initiative, along with outcomes, deliverables, and measures of success.



Initiative Co-design

Beginning in fall 2021, a workgroup of foundation representatives and leaders of color (*Appendix 1*) came together to design a new approach to intentionally invest in nonprofit leaders of color and build a broader ecosystem of support for leaders who have experienced systemic disadvantages while working within the philanthropic field. From fall 2021 through spring 2022, the Pre-Program Design Workgroup designed the ILOC initiative, fully shaping the fellowship structure, the outreach and recruitment strategy, and a profile for leaders joining the first cohort (*Appendix 2*).

The workgroup led the outreach and recruitment process, which resulted in 283 applicants from 58 cities and towns across North and South Carolina. A mosaic of 12 nonprofit leaders of color (*Appendix 3*), including five who had participated in the workgroup, were selected to participate in the inaugural cohort. Fellowship activities officially began in May 2022.

The co-design process continued after the program's launch through graduation. The second co-design group (the Program Design Workgroup, *Appendix 4*) comprised two funders, both of whom were part of the Pre-Program Workgroup, and four fellows, two of whom participated in the Pre-Program Workgroup. The Program Design Workgroup met from August 2022 through May 2023 and was responsible for helping shape the content of the virtual and in-person sessions, as well as providing feedback on the overall theory of change for ILOC.

Fellowship Components

ILOC is designed to promote trust, connectedness, and understanding of the barriers and opportunities to investing in leaders of color and the often-underfunded communities and efforts in which they lead. A cohort of 12 fellows engages with funders in experiences that provide new ways to connect with one another and that align their hopes and expectations for their time together.

The **activities** of the inaugural fellowship year included the following (*Appendix 5*):

- Text-based dialogue: A series of discussions designed to examine the nuanced realities of leaders of color and the philanthropic community.
- Learning sessions: Consultative sessions designed to address organizational needs such as strategic planning, board development, communications, and financial sustainability. Half of the activities were directly responsive to topics that fellows' requested.
- Strategic Thought Partnerships (STPs): Matched relationships to learn about and engage with the leader experience, deepen relationships, and mutually understand barriers and roadblocks faced by leaders of nonprofits and staff implementing equity-based practices in their foundations. See *Appendix 6* for a list of foundation staff who served as STPs.

The fellowship also includes **funding opportunities**:

- Up to \$25,000 as general operating support to each leader's organization during the seminar year.
- Up to \$10,000 as a stipend to each leader, during the seminar year, to be used as the leader deems necessary (e.g., wellness, capacity support, salary elevation).
- \$150,000 over three years in general operating support to each leader's organization after the program. The funds are a 1:1 match between The Duke Endowment and an assigned sponsor donor for each.

Organization Involvement

The list of organizations supporting this effort represents many foundations and resource organizations operating in North and South Carolina. These organizations have embraced the urgency of inventing new approaches to investing in communities and acknowledged the systemic lack of investment in leaders of color and their organizations and communities. The list has shifted over time to form a representative group from the Carolinas with the ability to seed lasting impact.

North Carolina	South Carolina
Anonymous Trust BlueCross BlueShield Foundation of NC Kate B. Reynolds Charitable Trust Z. Smith Reynolds Foundation	BlueCross BlueShield Foundation of SC Coastal Community Foundation of SC Self Family Foundation Sisters of Charity Foundation
Serving the Carolinas	
The Duke Endowment	

The Duke Endowment is the lead funder of ILOC, supporting project administration as well as the matching funds for each fellow. MDC, a nonprofit based in Durham, North Carolina, and serving 13 Southern states, facilitates ILOC, leads the co-design process, and is responsible for implementing the fellowship. MDC's Equity Centered Leadership & Philanthropy team leads this effort (*Appendix 7*). 5

Evaluation

In spring 2023, at the conclusion of the fellowship's first year, MDC conducted an evaluation to understand program strengths, impacts, and opportunities to improve the ILOC experience for future cohorts.

Data collection was conducted by MDC's Director of Learning and Impact and included:

1. A Fellow Survey, completed by 9 out of 12 fellows (75% response rate). The survey assessed the extent to which the program met fellows' expectations, whether it helped them make progress on personal and organizational goals, the value and impact of relationships developed, and opportunities to improve the fellowship experience for future cohorts.
2. A Fellow Focus Group with 11 of 12 fellows (92% participation) at the in-person closing session in May 2023. The focus group explored the most valuable and rewarding aspects of the fellowship, how fellows were approaching their work differently in community, ways in which fellows have seen funders shift their thinking or actions, and other opportunities and challenges related to the fellowship experience.
3. A Funder-STP Survey, completed by 11 out of 12 STPs (92% response). The survey assessed the extent to which ILOC met STPs' expectations, whether it had an impact on funders personally or their foundation more broadly, the value and impact of relationships developed, and opportunities to improve the program for future fellows and funders.
4. A review of in-person and virtual convening evaluations conducted after each gathering throughout the fellowship year.



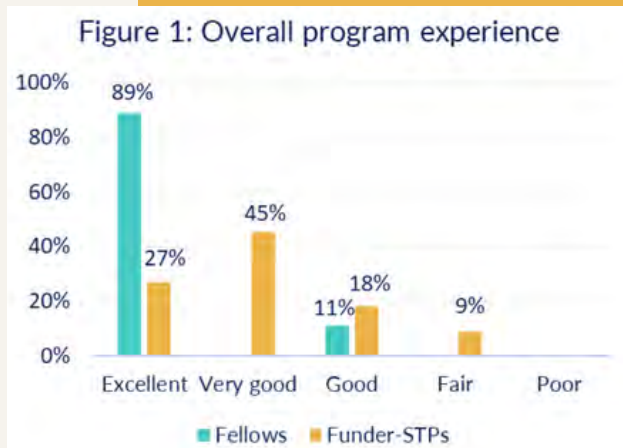
The evaluation did not include an assessment of the year 1 recruitment and selection process. This was explored in facilitated discussions with the Selection Co-Design Group in August 2023. Recommendations will be integrated into the recruitment and selection process for Cohort 2, which launches fall 2023.

Program Strengths

1. Overall

Overall, ILOC fellows and funder-STPs had a **positive experience**, and experiences generally aligned with participants' expectations for the program.

It was such an honor to have participated in this experience. I am very grateful for the MDC team and the funders that were courageous enough to take on a challenge to have conversations that sometimes can be uncomfortable. I hope future fellows will enjoy it as much as I do. – Fellow



ILOC fellows and funder-STPs were highly likely to recommend the program to other nonprofit leaders of color. Funder-STPs expressed moderate to high interest in serving as an STP for ILOC in the future if asked.

Each session exceeded my expectations every single time. The space for emotions and open conversations oftentimes felt like group therapy sessions and this was something that I did not expect coming into this cohort. – Fellow

10 / 10

Average likelihood that fellows would recommend the program to other nonprofit leaders of color

Response Range = 9-10

9.7 / 10

Average likelihood that funder-STPs would recommend the program to other nonprofit leaders of color

Response Range = 8-10

7.8 / 10

Average likelihood that funder-STPs would serve as an STP for ILOC in the future if asked

Response Range = 5-10

2. Co-design process

Overall, the co-design process (1) successfully engaged and responded to the voices of both fellows and funders. The six funder-STPs who participated in co-design from August 2021 through May 2022 felt like their ideas were taken into consideration throughout the process. Most funder-STPs were satisfied with the results of the co-design process (indicating satisfaction of 75 or 80 out of 100). Two individuals were somewhat dissatisfied (indicating satisfaction of 0 and 38), though it is unclear why.

Figure 3: My ideas were heard and considered throughout co-design (funder-STPs only)

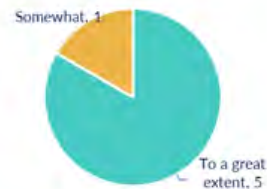
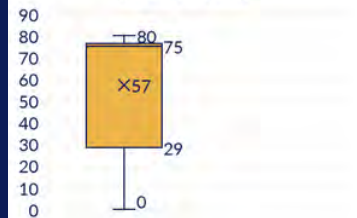


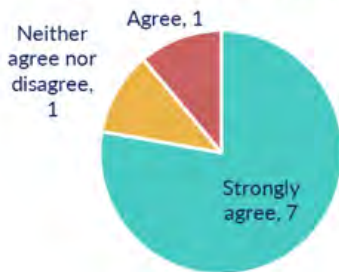
Figure 4: Satisfaction with results of co-design process (funder-STPs only)



Any time we had a recommendation, it was taken into consideration. It felt like a real collaboration. – Fellow

3. Program design & implementation

Figure 5: Content was relevant and aligned to my (fellows') needs



a. Program content

Fellows strongly agreed that program content was relevant to them personally and aligned to where they were in their personal leadership trajectories.

Opinions varied on which capacity-building sessions were most helpful over the course of the year; 78% of fellows found the Organizational Assessment sessions to be very helpful, while 56% found the sessions on Communications/Elevator Pitches and Sustainability very helpful. Variation in the topics that fellows found most helpful is not surprising given that each leader came in with different organizational needs.

In addition to the capacity-building sessions, fellows found the assigned readings helpful (Appendix 8) and indicated that peer consultancies helped them make progress on organizational goals.

Figure 6: Helpfulness of capacity-building sessions

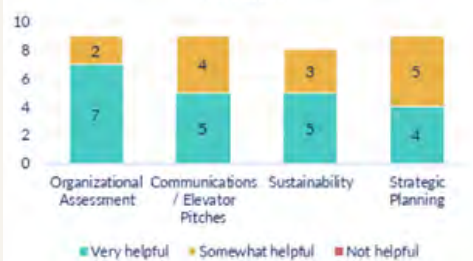
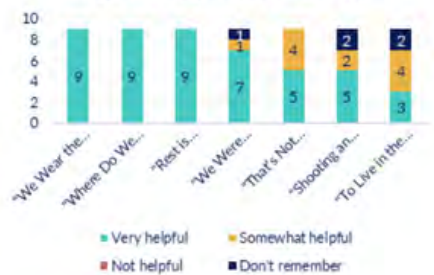


Figure 7: Helpfulness of readings



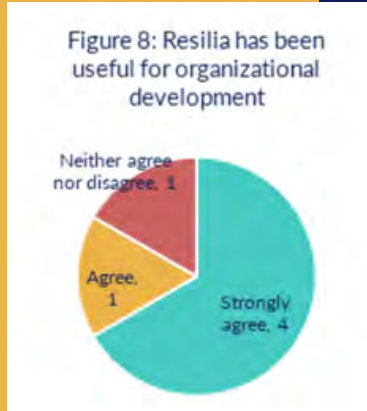
The peer to peer consultancy is invaluable and I'm taking this process back to [my] agency.

– Fellow

8.5 /10

Average likelihood that fellows would recommend Resilia to other organizations

Response Range = 5-10



[Resilia] has been a great resource. I hope to continue as we fine tune and grow our organization. – Fellow

b. Supplementary resources

The funding that ILOC provided for **general operating support** proved to be a valuable resource for fellows’ organizations. Use of the funds varied from organization to organization; however, it was common across many organizations (78%) to put the dollars toward staff salaries and/or hiring additional staff or consultants. Other uses included facility renovations, rebranding efforts, and technology upgrades.

Many fellows found the resources offered through Resilia (an online platform that provides technical assistance, coaching, and capacity-building support to nonprofits) to be useful for organizational development.

c. Program structure

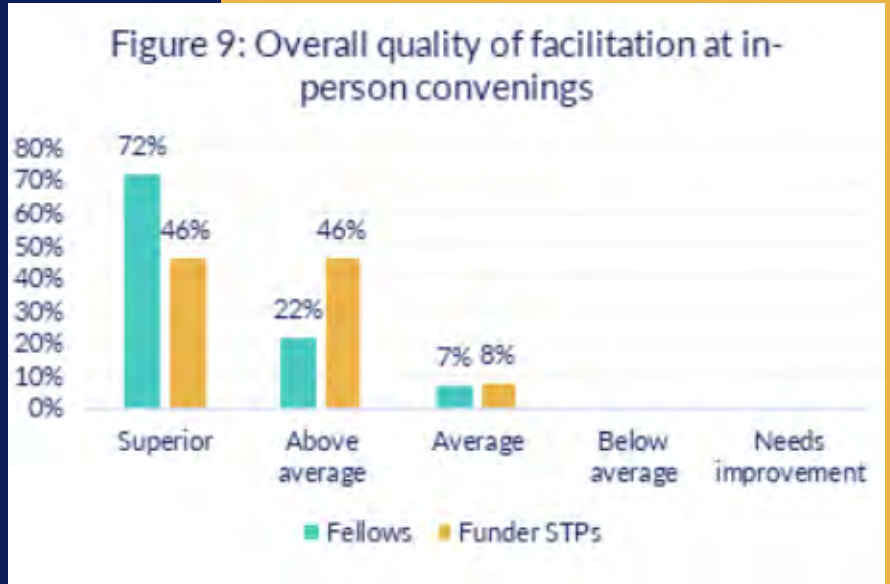
Fellows gathered in person each quarter for 2.5 days and virtually one time per month for three hours for capacity building and dialogue. Funder-STPs joined the in-person sessions for approximately one day each quarter and for a portion or the duration of each of the monthly virtual sessions. Both fellows and funder-STPs agreed that this was about the right amount of time for in-person and virtual gatherings.

Fellows and funder-STPs had lots of **positive comments about the in-person convening location** (The Duke Endowment headquarters in Charlotte, NC), particularly the convenient location for participants traveling from both North and South Carolina. At the same time, even those who loved meeting at The Duke Endowment felt that the program could benefit from rotating to other locations on occasion (see “Opportunities for Improvement” section).



d. MDC leadership and facilitation

Fellows and funder-STPs consistently rated MDC facilitation high on session evaluations. Comments indicated that MDC was able to create spaces where both groups could actively engage and contribute to the conversation.



Thanks to the MDC Team for everything you do to support ILOC and listening to our needs and keeping them centered in our work.
– Fellow

The MDC team has worked tirelessly over the last 4–5 months to build the infrastructure for ILOC; to strengthen communication; establish roles; clarify areas of uncertainty; respond to the multiple stakeholders. This in-person meeting was a great reflection of the time and attention MDC has dedicated to responding to the needs expressed and building meaningful content.
Great work!

– Funder-STP commenting on the in-person session in January 2023



4. Relationship building

One of the greatest strengths of ILOC is its ability to foster new relationships and trust within and across the fellow and funder groups that participated.

Fellow-to-fellow relationships

Fellows were able to contribute to the ILOC fellow and funder community in ways they expected (e.g., sharing personal and professional experiences with peers). They built strong connections with each other not just by participating in programmatic activities but also by frequently talking one on one with one another (78%) and by engaging in a fellow-initiated group text (100%).

“Working in a nonprofit is lonely,” noted one fellow; peer connections provided fellows with a sense of community and source of consultation and support that can be difficult to find as a nonprofit leader of color.

Looking back on the experience, fellows described the relationships they built with one another as one of the most rewarding aspects of the program. Being in community with other leaders of color gave them an opportunity to “remove their masks,”⁽²⁾ be vulnerable, and to support—and be supported by—peers who shared similar experiences.



[We connected about] shared joys and journeys, mostly. Having someone to bounce ideas off. To have a place for peer to peer connections and hold each other accountable. – Fellow



[I appreciated] the similarities with other leaders of color. Being able to discuss common struggles. I look forward to each visit because of the opportunity to be vulnerable. – Fellow

I was so glad to have Latinx voices at the table. I saw things from a different perspective than I would have otherwise. We [Blacks and Latinx individuals] have so many similarities—it’s a shame we don’t do more work together. Going forward, I will reach out more to my Latinx brothers and sisters to work together. – Fellow

The access to strategic thought partners with whom we could build relationships and understanding about the best approaches to work with foundations [helped my organization make progress on its goals]. – Fellow

Learning from my [fellow-STP], the work and vision, as well as the challenges faced [was one of the most valuable aspects of this experience]. – Funder-STP

Working alongside leaders and other like-minded foundations was encouraging, supportive, and inspiring. Dedicated time together builds relationship and mutual benefit. – Funder-STP

Fellow-funder relationships

In addition to building relationships with each other, the majority of fellows developed meaningful connections with their STPs. The frequency and format (via phone/ videoconference or in-person) of fellow-funder connections varied by pair. Most talked by phone regularly, while some occasionally met in person. The content of each pair's conversations varied, as well. One fellow said their STP conversations "focused on current grants and strategies to consider for multi-year funding."

Another fellow said that, in addition to program strategy, they discussed "leadership as people of color, our success and challenges, and ways to make time for self-care."



Both fellows and funder-STPs found value in these relationships. Funder-STPs helped fellows make progress on organizational goals, while fellows helped funders deepen their understanding of nonprofits led by people of color and the barriers they face when accessing philanthropic resources. At least eight funder-STPs cited their connections with the fellows as one of ILOC's "most helpful" program components for their foundation.

Funder-funder relationships

Funder-STPs appreciated not only the opportunity to build relationships with the fellows but also the opportunity to connect with other funders. Many cited the value of the funder group conversations and the group's willingness to engage in transparent dialogue about the "real issues at [their] foundations."

[I] did not know of the personal work that we would get to engage in with our funding peers. This was a welcomed surprise and offered much reprieve.

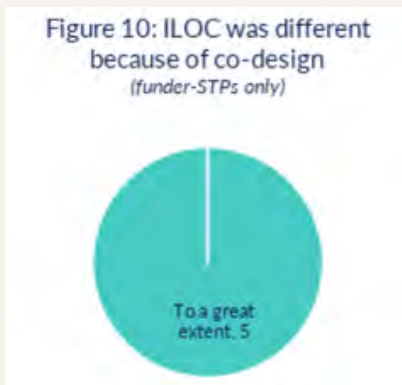
– Funder-STP

Participating in honest, open, reflective dialogue in funders group [was one of the most valuable aspects of this experience]. – Funder-STP

Program Impact

1. Impact of co-design

It's apparent that the co-design process had an impact on ILOC and that program design and delivery was different because of this process.



The voice of the nonprofit leaders would have been lost or not as valued. – Funder-STP

Having multiple perspectives informed the design and ensured a level of depth that would not have been accomplished with funders or fellows only. – Funder-STP

We [the co-design group] pivoted several times based on grantee/partner feedback. We were open to that and willing to change. – Funder-STP

Co-design shaped the fact that [fellows] received a stipend [in addition to general operating support]. – Fellow

In addition, the co-design process had a moderate to strong impact on funder-STPs personally.

[The co-design process] gave me an opportunity to really listen to the nonprofit leaders and to actually hear how processes can be stacked against them and how we as funders can impose unintended consequences and time restraints on them without realizing it. – Funder-STP on the impact that co-design had on them personally

3.5/4

Average impact that co-design had on funder-STPs personally

Response Range = 3-4

2. Impact on fellows

ILOC positively contributed to fellows' personal and professional growth, as well as their organizations' development.



A wonderful experience that I will never be able to truly articulate its impacts on me as a Leader. I'm better for myself, my organization and community. – Fellow

Powerful. The best fellowship I have ever been a part of. This was so necessary and vital to my growth. – Fellow

a. Personal and professional growth

Fellows indicated that ILOC helped them become more confident leaders in their own communities and embrace their role as mentors for other leaders of color.

Fellows described a greater confidence in “removing the mask”(3) and speaking up on behalf of their communities.



To be able to take my mask off here [in ILOC] has made it easier for me to take my mask off in my own work in community. ... It may not always be safe, but I feel like I need to do this for others in my community who may not have a voice. – Fellow

Previously, I was quiet and let the work speak for itself. Now I will speak up and call things as I see them. – Fellow

I'm able to merge my roles and identities and show up unapologetically—for example, bringing my full self as a nonprofit leader and advocate to my role on a [local board]. – Fellow

I want to use my individual power to give power to others, making space for those who don't have a voice to be heard. – Fellow

Fellows also said that ILOC helped them recognize and embrace the important role they play as mentors and sources of support for other leaders of color.

By nature of being part of [ILOC] and the codesign group, I became the person to answer questions versus the person asking the questions. I'm now the one leading conversations with other Black nonprofit leaders. – Fellow

I'm thinking about how to pass the baton, how to pave the way for the next generation of leaders to do the work from a better place than where we started. – Fellow

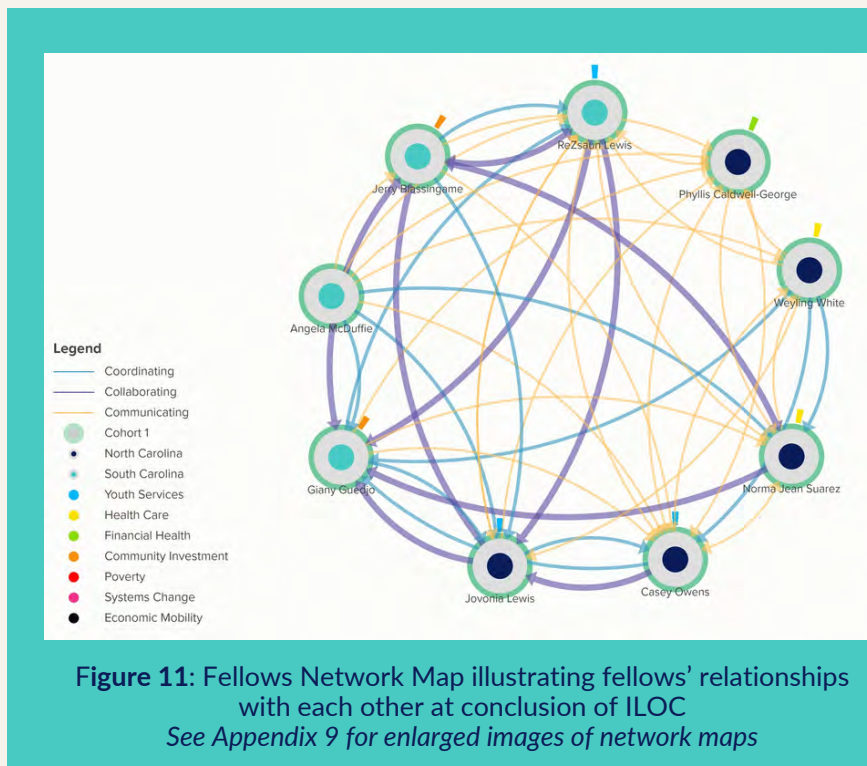
We need to find other 'L-O-C' to 'I' in, meaning, we need to find other 'leaders of color' to 'invest' in. How many others like us are out there? Not just the next generation. – Fellow

This experience feels like a recharge. And that recharged feeling will be transmitted to others. We're taking small steps to change the attitude of the community, showing through example. – Fellow

b. Relationships with peers

Before ILOC, fellows did not know each other. However, by the end of the program, fellows felt deeply connected to one another. As illustrated on the Fellows Network Map (see Appendix 9 for enlarged image), many fellows indicated that they were not only “communicating” with other fellows (green arrows) but actually “coordinating” (blue arrows) or “collaborating” (purple arrows) to build a broader ecosystem of support for leaders of color and to assist funders in understanding culturally relevant approaches to working with communities of color. (4)

With deep, intentional connection, the ILOC fellows’ network can be a powerful tool for systems change by increasing alignment and collaboration among previously disparate individuals and organizations. Drawing on collective energy and resources, the network can tackle complex challenges that no individual could solve on their own.



c. Organizational capacity

ILOC helped fellows make progress on challenges they identified in their organizational assessments in June 2022. The most tangible changes were related to strategic relationships (e.g., improved communication or engagement with partners and constituents) and internal operations and management (e.g., new personnel policies established, upgraded technology in place).



I used to think strategic planning was only for the ‘big’ organizations, but now I know it’s for us, too. – Fellow

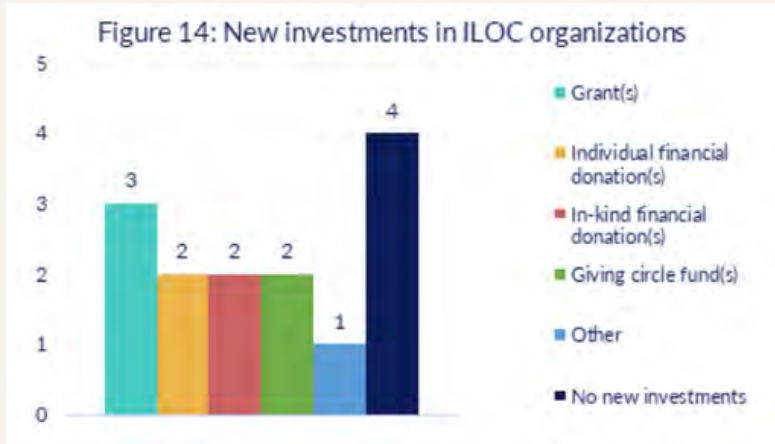
From this experience, strategic relationships have stayed top of mind and I continue to explore networks and conversations that I may not have considered with the same thought process. – Fellow



The session about rest was very important. I was able to take back strategies to my organization for our ‘no-meetings’ blocks and it has helped my staff tremendously. I have noticed less burnout and a shift in their energy.” – Fellow

d. New investments in fellows' organizations

Five out of nine organizations have received new investments as a result of fellows' participation in ILOC. New investments included grants (including one organization that received two grants totaling \$50,000), individual financial donations, in-kind donations, and giving circle funds. One fellow indicated that there was potential for new investment "but nothing concrete yet." While some of these new investments were made by funders participating in ILOC, it is unclear if any came from funders not engaged in ILOC.

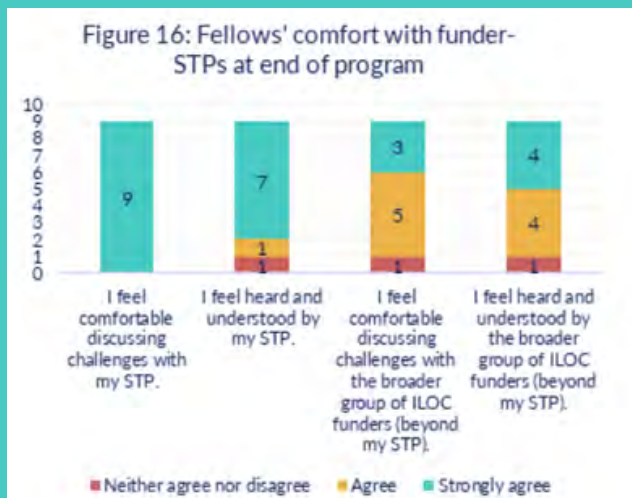
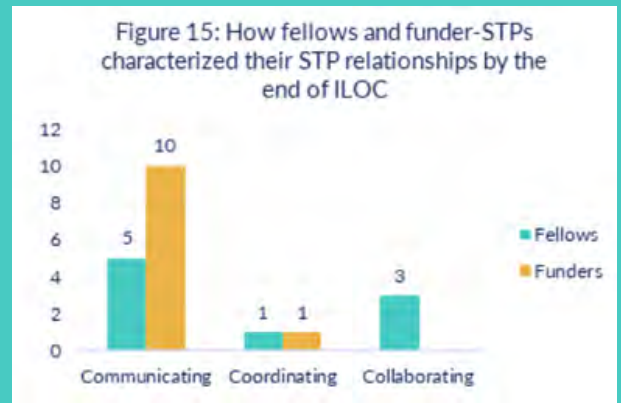


There was a funder that gave to our organization the most they have ever given all because of the constant conversations from ILOC.
 – Fellow

3. Impact on fellow-funder relationships

Fellows and funder-STPs deepened connections and trust over the course of the program.

Most fellows and funder-STPs did not know each other before joining ILOC. By the end, however, all fellow-funder pairs indicated that their relationship had evolved to a level of "communicating," and in some cases, fellows indicated that they were "collaborating" with their STP. See Appendix 9, Maps B & C, for network maps that illustrate how relationships between fellows and funder-STPs shifted before and after the program.



Fellows and funder-STPs not only established new connections through ILOC but also deepened their relationships over time. At the program's midpoint in January 2023, five out of seven fellows (71%) and six out of six funder-STPs (100%) had an "above average" or "superior" sense that fellows and funders were "deepening rapport, building mutual trust and respect, and centering the leaders' expertise and experiences." This was generally maintained through the conclusion of the program in May 2023, with eight out of nine fellows (89%) and three out of four funder-STPs (75%) sharing the same sentiment.

At the conclusion of the program, fellows strongly agreed that they felt heard and understood by their respective STPs and that they were comfortable sharing challenges with them. Fellows seemed to have slightly less comfort with the broader group of ILOC funders (beyond individual STPs), though most fellows still agreed that they felt heard and understood by the broader group and were comfortable sharing challenges with them.

Seven fellows indicated that they built quality relationships with their STP, many of which evolved into “friendships.” Two fellows noted that they had challenges connecting with their STP and were not able to deepen relationships.

I feel that my STP is aligned with my needs and challenges. I look forward to our continued growth. – Fellow

I think my STP and I were comfortable from the beginning, however, there was a higher level of engagement and trust built after our in-person meeting together. – Fellow



Funder-STPs described a similar increased level of comfort and willingness to share challenges over the course of the program.

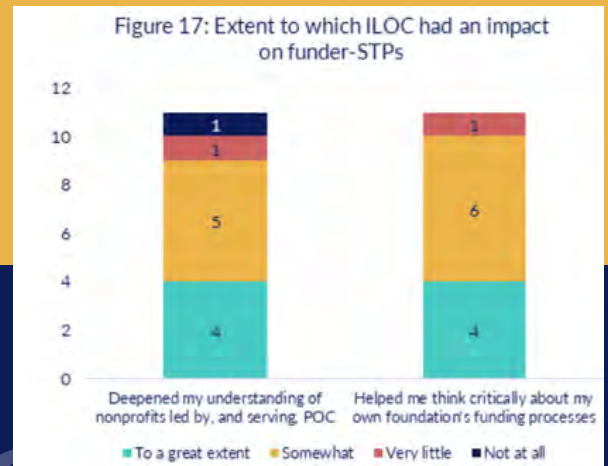
We both became more comfortable sharing professional challenges and personal details over time. – Funder-STP

We continued to have candid conversations. I probably became more open in sharing challenges. The flow of conversation was always easy, and we established trust quickly. – Funder-STP

4. Impact on funder-STPs

ILOC was somewhat successful in meeting its goal of “assisting funders in understanding new, culturally relevant approaches they will use to help leaders of color gain greater access to resources.”

A majority of funders indicated that ILOC deepened their understanding of nonprofits led by and serving people of color and that the program helped them think critically about their funding processes either “somewhat” or “to a great extent.” Only one or two indicated that the program had “very little” impact in these areas. This variation is likely related to each funder-STP’s level of familiarity or comfort with the topics explored through ILOC. Funder-STPs who experienced “somewhat” or “very little” impact made comments like “I think about this a lot already,” noting that the program “could have challenged the funders a bit more.”



Our job is to think and act in the best way possible to invest in solutions that will produce the best outcomes. Cultivating deep relationships with nonprofits allows you consider ways to center the needs of the community over those of a funding institution. – Funder-STP

Our [foundation's] processes will probably not change, but the way I personally screen requests prior to presentation to the board will take into account the conversations I have had with our nonprofit partners. The questions asked will be framed differently as I revise my interim and final reports.

– Funder-STP

When asked how funder-STPs were personally putting into action what they had learned from this experience, responses ranged from using their voice to be better allies and advocates for leaders of color, to taking more time to build relationships with organizations led by people of color, to reflecting on their own role in upholding or transforming power in philanthropy.

Relationships with peers

Even those funder-STPs who did not experience significant shifts in their own thinking found value in connecting and deepening relationships with peer foundations.

What I enjoyed most was learning of the personal or organizational hurdles for each Foundation, because it allowed for a conversation that addressed the multifactorial realities of trying to do this work. – Funder-STP



Many funder-STPs noticed their peers developing greater awareness of, and empathy for, leaders of color and the challenges they experience. One funder-STP said that “interest in hearing from the fellows grew as time went on. Fellows were viewed as peers and experts - not as needy.”

I saw real intentional self-reflection in the funders’ group and a level of trust that allowed us to share challenges in a raw, honest way that is often difficult in our sector (sometimes as funders there is pressure to present an image that we’ve ‘got it all together’).
 – Funder-STP

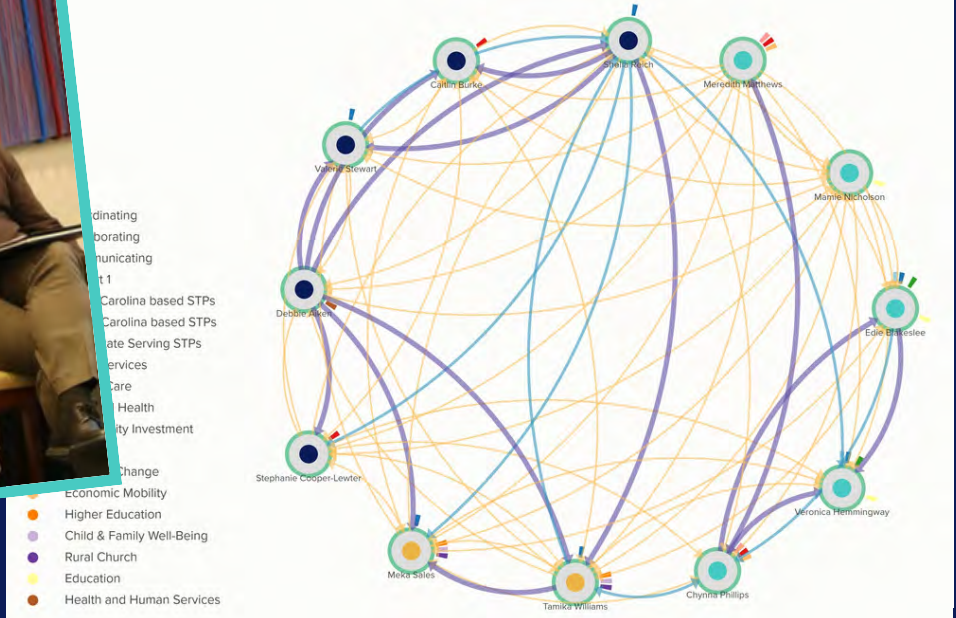
At the same time, a couple of funder-STPs noted that they saw little to no evidence that their peers had developed a new way of understanding or engaging with leaders of color by the end of the program.

Several funder-STPs noted that their peers became more transparent and willing to share challenges with one another as the program progressed. This allowed for deeper conversations within the funder group.



Figure 18: Funders Network Map illustrating funder-STP relationships with each other at conclusion of ILOC

See Appendix 9 for enlarged images of network maps



As illustrated on the Funders Network Map, most funder-STPs indicated that they were “communicating” with each other (green arrows), and a few were even “coordinating” (blue arrows) or “collaborating” (purple arrows) with peers outside their foundation.

Much like the fellows’ network, it is incredibly valuable for funders to have peers that they can lean on for support as they work to build a broader ecosystem of support for leaders of color and advance culturally relevant approaches to working with communities of color.

5. Impact on participating foundations

Although several funder-STPs described a shift in their personal thinking or actions as a result of ILOC, most felt that the program had had a limited impact on their foundation’s investments and practices more broadly, at least at the end of the fellowship’s first year.

The majority of funder-STPs indicated that their foundation’s funding for leaders of color (beyond ILOC fellows) had increased “very little” or “not at all” by the conclusion of the program. About a third said that their foundations were beginning to shift from a “transactional” to “relational” funding approach, while another third indicated they had made little to no changes in this area. Another third said that their foundations were already working on this. One funder-STP described the changes their foundation was making:

“We are beginning to lay out specifically what it means for a particular grant to advance racial equity. Taking this step will lead to better questions and opportunities to deepen relationships with grantees.” – Funder-STP

Funder-STPs who indicated little to no change within their foundation described some of the roadblocks:

Time constraints, board education. – Funder-STP

We are a large foundation, so making changes will take time to build buy in. – Funder-STP

Many of the changes suggested ... are currently difficult to do given current Foundation structure. There are other factors at play stifling ability to do multi-year grants for example. – Funder-STP

Figure 19: Extent to which participation in ILOC resulted in tangible changes within foundations (from funder-STP perspectives)



Fellows, too, described limited evidence of change within the foundations, beyond the individual STPs:

There was not enough concrete action [on the foundation side]. There were a lot of actionable ideas, but no movement. As ILOC leaders make concrete shifts in how we do our work, the funders should be doing the same. – Fellow

True change needs to happen at the foundation level. Just because one part of the wheel changes [i.e., the funder-STP], doesn't mean the whole wheel changes. Individual change does not always equal systematic change. – Fellow

Opportunities for Improvement

1. Clarify co-design goals & limitations

This was the first year of ILOC and the first attempt at co-design. Overall, the co-design process was strong, with both funders and fellows feeling like their input shaped the program in a positive way. To improve the process in the future, funder-STPs who participated in the Pre-Program Design Workgroup recommend setting clear goals for the co-design process and specifying who has ultimate decision-making authority, particularly when it comes to budget. In addition, a significant portion of the Pre-Program Workgroup's time was spent on recruitment and selection; next time, more attention should be given specifically to program design.

MDC was not able to collect fellows' feedback on the co-design process for this evaluation, but it will be important to hear from them before the next co-design group begins work this fall.

I think the process was initially a struggle for all parties involved as it struggled to get a clear focus and seemed to start over each time the initial group met... Expectations for the group were not clear enough. – Funder-STP

We need to have a better sense of budgets and what the guardrails are for some of the decisions that we can make. – Funder-STP

Define what is co-design vs input vs influence; final decision-makers should be clear; we spent more time on recruitment vs program design; compensation for fellows for the full process. – Funder-STP



2. Enhance program design & delivery

Overall, the design and delivery of ILOC was strong in the first year. The program fostered relationship building, leadership development, capacity building, critical reflection, and more among the fellows and funders who participated.

In terms of how to improve program design, very few themes emerged. Instead, most suggestions were one-off ideas that are worth considering as the program gets refined in year 2.

a. Clear expectations and outcomes

A small number of funder-STPs said it would have been helpful to have a clear understanding of fellow and funder expectations, as well as anticipated outcomes, at the program's outset. Some also expressed interest in having a full meeting schedule up front so that participants would have enough lead time to block off their calendars for program activities.

On the fellows' side, one individual suggested that "a shared charter or pledge" among fellows could help the cohort have a "better vision of how the cohort can be valuable" and could provide a way for fellows to "collectively hold themselves accountable to contributing to the cohort."

[It will be helpful to have an] understanding from the beginning what will be measured/outcomes expected of funders and participants – which we will be able to do better in year 2.
– Funder-STP

b. Organizational capacity building

Fellows appreciated the capacity-building sessions and felt that the sessions helped their organizations make progress on challenges. Participants identified a few content areas that could be strengthened:

- **Funding and sustainability** – At least two fellows said it would have been helpful to talk more about sustainability or get help identifying potential funding sources, either through the capacity-building sessions or via their STP relationships. Similarly, several funder-STPs noted that it would have been beneficial for fellows to have more fundraising training (including hearing fundraising success stories from leaders of color outside the cohort) and "additional opportunities to network/connect with other funders" via events like funder forums or virtual meet-and-greets. As one funder said, "foundations do not have to raise money, so just having consultants or us talk about trust etc. does not necessarily translate into \$\$ [for fellows' nonprofits]."
- **Guidance on navigating philanthropy**– At least two funder-STPs said it would be helpful to provide fellows with more detailed information about different types of foundations, how they operate ("role of program staff, internal challenges, etc."), and "practical guidance for building relationships with current funders."
- **Other nonprofit challenges** – Individual fellows said they would have benefited from additional help with "scaling for greater impact," "more discussions about board development and management," and more follow-up on the three big issues that fellows identified in their organizational assessments.



c. In-person and virtual gatherings

Overall, feedback on the in-person and virtual convenings was highly positive. However, a few fellows made suggestions for how to strengthen these sessions:

- Utilize the in-person meetings for face-to-face time with funder-STPs, and use the virtual meetings for leadership development and technical support.
- Increase opportunities to engage with foundation CEOs and trustees (see next section for more detail).
- Provide opportunities for fellows to lead sessions with funders and fellows.

As noted in the “Program Strengths” section, fellows and funders alike had lots of positive things to say about meeting in person at The Duke Endowment in Charlotte, North Carolina. At the same time, many acknowledged the potential value of traveling to fellows’ communities for in-person sessions.

Feedback on the in-person meeting location
The Duke Endowment Headquarters, Charlotte, NC

maybe rotate in-person meetings to spread travel time for folks
would be nice to move meetings around
move to different regions to spread travel burden among fellows/funders
nice to visit other places but i also recognize logistical challenges
liked it best when we moved beyond sitting in a room to do site visits and break bread together
would have enjoyed traveling to areas where the work is happening
travel to fellows' cities and acknowledge land and current progress towards liberation in each place
maybe useful to visit fellow in their cities
would be nice to move meetings around and be "in-community" more
consider rotating locations

d. Support fellows “back home”

Fellows expressed significant appreciation for the community they built through ILOC convenings, but some said they wished they received the same “support back home,” particularly from local funders.

[It's challenging to] implement what is learned from ILOC. I know better, but it's a question of how to do better. It's the burden of knowledge. The pressure of knowing things could be better but that [funding] decisions are being made to keep things in place. – Fellow



The funders in my area do not care or know about ILOC. They are trying to create their own version. It's that feeling of not being supported in the community, but then the community starts creating their own version of the same thing, but without stipends or general operating support! – Fellow

The dedication (content and programming) to the growth and development of our foundations could have been stronger. Most of the cohort year focused on fellows but lacked focus on strengthening 'how' foundations change in this space.

– Funder-STP

Learning with/from peers and co-strategizing on how to use ILOC to change philanthropy. It was much more heavily focused on 'leadership development and capacity building' for leaders of color than on transforming philanthropy.

– Funder-STP



3. Deepen funder learning & engagement

The most common recommendation from both fellows and funder-STPs for how to improve ILOC was to deepen funder engagement and action.

When asked what was missing from ILOC, half of the funder-STPs said a greater focus on funder learning and engagement, including greater involvement from foundation presidents or trustees, would have been beneficial. A greater emphasis on funder learning may have helped more foundations “move from talk to action,” which at least two funder-STPs said was limited throughout the program.

Fellows agreed that the focus on funder learning and engagement should have been stronger and that there should be transparency in the process. Fellows felt that communication with the funder group was often one-way, with fellows providing updates on their progress but rarely hearing updates on what foundations were learning or doing. Some fellows suggested that the funders participate in a structured learning process similar to the capacity-building sessions for fellows.

We need more conversations between the funders and leaders. We are curious about what is being talked about in the funder meetings. It seems like we share with the funders what ILOC leaders are talking about in meetings, but not vice versa.

– Fellow

There's a power dynamic. What work are they doing? I don't want to be the 'token thing' that they get to talk about but no real change happens.

– Fellow

Possibly start a learning program for funders to gain more knowledge and change their old ways of thinking. There has to be a willingness to be uncomfortable. – Fellow

We need CEOs and Presidents in the room. This is where the change will happen. Walking them through various activities like forcefield analysis ... risk assessment ... conversations that will help prepare them to stand when they're challenged. – Fellow

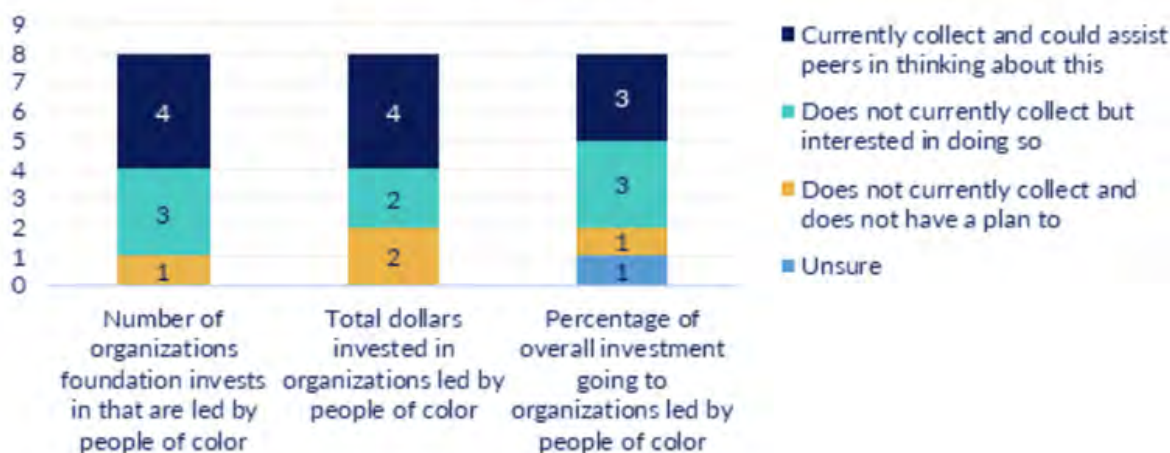


Fellows were also interested in hearing how foundations are tracking investment in organizations led by people of color and whether those investments are shifting over time.

At least one funder-STP agreed, suggesting the funders “have a shared dashboard with metrics of who and how we fund that could be shared with the ILOC fellows. I think we should have more visible accountability.”

How has your funding of leaders of color shifted over this time? If it hasn't increased, then nothing has changed. It starts with data. Foundations need to track investment in people of color. We need local (not national) data that their funding has moved the needle. – Fellow

Figure 20: Data currently collected by participating foundations (May 2023)



Based on the results of the Funder-STP Survey, about half of the eight participating foundations currently collect data on their investments in organizations led by people of color. Two or three do not currently collect this type of information but have an interest in doing so, while one or two have no plans to do so.

A greater emphasis on funder learning and engagement seems both important and possible in future cohorts, given that so many funder-STPs and fellows identified this as an area for improvement. As one fellow stated, “I believe that some [funders] genuinely want to dive deeper in the conversation about implicit bias, systemic racism when it comes to funding.” The desire for change exists, at least among some funders, but more attention is needed in helping them move from ideas to action.

4. Elevate ILOC's reputation

Fellows felt that the “buzz” around ILOC could and should have been bigger. In particular, more funders and individuals with influence should know about the program itself and about the fellows who were selected to participate. As one fellow said, “[ILOC] could be a national model” for building relationships between leaders of color and philanthropy.

Some felt that even the graduation celebration should have been higher profile with more people aware and invited to attend. Funder-STPs did not comment on ILOC's reputation or related marketing activities, aside from one person who suggested “more tools on how to share results of this process with colleagues as we are walking the journey. I'm wondering if this could assist with buy in.”



The marketing could be stronger. Funders should be coming to fellows because they know about ILOC. Not enough information has been broadcasted about ILOC.
– Fellow

Funders should have something about ILOC on their main page. It seems like ILOC is a token project or that it's being hidden from other potential funder partners. – Fellow

There should be a write-up on the impact of each fellows' organization in community, a press release that can be shared with local and state leaders.
– Fellow

Conclusion

Overall, the ILOC program was innovative and impactful in its first year. The co-design process provided opportunities for participating fellows and funders to shape the program. Fellows developed meaningful relationships with each other and with funders. They grew personally and professionally and strengthened organizational capacity, particularly strategic relationships with partners and constituents. Foundation staff deepened connections with one another and challenged each other to invest more and differently in organizations led by people of color.

In future years, there are opportunities to clarify the goals and limitations of the co-design process, to strengthen program design and delivery (e.g., adding resources related to funding and sustainability), to deepen funder learning and engagement, and to elevate ILOC's reputation.



Endnotes

1. The Funder-STP Survey asked for feedback on the co-design process from the six funders who served on the Pre-Program Design Workgroup during program implementation (August 2022– May 2023). The Fellow Survey did not include questions about co-design, partly to keep the survey to a reasonable length and partly because MDC intended to collect feedback via a facilitated conversation with co-design team members. Two fellows shared unsolicited feedback on the co-design process during the focus group and on the Fellow Survey, but it will be important to hear from them before the next co-design group begins work this fall. [Return to my place.](#)
2. This is in reference to “[We Wear the Mask](#),” a poem by Paul Laurence Dunbar that fellows discussed as part of their fellowship experience. [Return to my place.](#)
3. See previous. [Return to my place.](#)
4. Fellows and funder-STPs were asked to characterize their relationships using the following definitions: A) *No connection: Our efforts to build a broader ecosystem of support for leaders of color and assist funders in understanding new, culturally relevant approaches to working with communities of color are not connected with one another. We may know about each other’s work, but we don’t communicate with each other about it.* B) *Communicating: We communicate with one another about building a broader ecosystem of support for leaders of color and assisting funders in understanding new, culturally relevant approaches to working with communities of color. We might share information, ideas, or data.* C) *Coordinating: We coordinate efforts to advance shared goals of building a broader ecosystem of support for leaders of color and assisting funders in understanding new, culturally relevant approaches to working with communities of color. Our efforts are closely connected but we maintain separate resources and responsibilities.* D) *Collaborating: We collaborate together to advance shared goals of building a broader ecosystem of support for leaders of color and assisting funders in understanding new, culturally relevant approaches to working with communities of color. We work in partnership, sharing resources and making shared decisions.* [Return to my place.](#)

Appendix 1

Participating Members of the Pre-Program Design Workgroup

The Pre-Program Design Workgroup included representatives from foundations serving North Carolina and South Carolina, as well as leaders of color that would go on to participate in the inaugural ILOC cohort. From fall 2021 through spring 2022, the Pre-Program Workgroup guided the development of the ILOC initiative, shaping the fellowship structure, the outreach and recruitment strategy, and a profile for leaders joining the first cohort. The workgroup also led the outreach and recruitment process, which resulted in 283 applicants from 58 cities and towns across North and South Carolina.

Representatives from North Carolina foundations

Shelia Reich, BlueCross BlueShield Foundation of NC

Valerie Stewart, BlueCross BlueShield Foundation of NC

Stephanie Cooper-Lewter, Kate B. Reynolds Charitable Trust

Representatives from South Carolina foundations

Edie Blakeslee, Coastal Community Foundation

Mamie Nicholson, Self Family Foundation

Representatives from foundations serving both North and South Carolina

Tamika Williams, The Duke Endowment

Dwayne Patterson, Mary Reynolds Babcock Foundation

Design thinking consultant

Kofi Boone, North Carolina State University

Leaders / inaugural fellows

Jovonia Lewis, Empowered Parents in Community

Weyling White, Care Share Health Alliance

Phyllis Caldwell-George, Financial Pathways of the Piedmont

ReZsaun Lewis, Lowcountry Youth Services

Adela Mendoza, Hispanic Alliance

Teresa Goodman, Community Initiatives, Inc.

Appendix 2

Ideal Fellow Profile

The Pre-Program Design Workgroup developed the following list of characteristics to represent a profile of an ideal leader for ILOC:

- Working with and/or serving communities of color and having a deep connection to them
- Primarily leading nonprofits, with those in other areas included (parent leaders, church leaders, community organizers, etc.)
- Midway in their career, possibly change agents in their communities
- Have a deep connection to the communities they serve
- Involved at a systems level and/or in direct service
- Strongly interested and/or experienced in building relationships with peers and funders
- Committed to long-term impact through their organization or network
- Having demonstrated qualities of servant leadership and strong values

Appendix 3

Inaugural Cohort of ILOC Fellows (2022-23)



L-R: Jovonia Lewis, Brie Goodwin, Giany Guedjo, ReZsaun Lewis, Angelica Santibanez-Mendez, Angela McDuffie, Jerry Blassingame, Norma Jean Suarez, Weyling White, Teresa Goodman, Casey Owens, Phyllis Caldwell-George

Jerry Blassingame – Soteria Community Development Corporation (Greenville, SC)

Jerry Blassingame is the founder and CEO of Soteria Community Development Corporation. He endeavors to empower individuals and the community as he advocates for economic and social justice through community and economic development. His passion is assisting individuals who have been incarcerated and helping them become productive citizens. Jerry is a certified reentry specialist through the Institute of Prison Ministry at Wheaton College who advocates for systemic change nationally. One of his greatest accomplishments was to help pass an expungement bill, H3209, in South Carolina in 2018. He serves as President of Correctional Ministries and Chaplain Association at Wheaton College, is a 2019 fellow in the Aspen Institute’s Healthy Communities Initiative and a 2016 fellow of JustLeadershipUSA, and received the Buck Mikel award for community development from the Greenville Chamber in 2019.

Phyllis Caldwell-George – Financial Pathways of the Piedmont (Winston-Salem, NC)

Phyllis Caldwell-George serves as President and CEO of Financial Pathways of the Piedmont. She’s a passionate advocate of the importance of asset building for low- to moderate-income households and a leader in the community. Phyllis has partnered and collaborated widely with government agencies, funding partners, and other nonprofits and has served as trainer, speaker, and educator for many housing counseling and financial education conferences, workshops, and training events. Most impressively and recently, Phyllis has proven to be an influential decision maker and visionary for the organization as she leads a very competent team of highly experienced staff members.

Teresa Goodman – Community Initiatives, Inc. (Greenwood, SC)

Teresa Goodman has worked the past 24 years in social services and nonprofit organizations creating, developing, assessing, and evaluating programming. As Executive Director of Community Initiatives, Inc. she continues to manage, develop, and fund support programs. Goodman plays an active role in her community and currently serves as chairperson of the Food Bank of Greenwood County's board of directors and previously served as a director for the Rotary Club of Greenwood, the Bowers Rodgers Children's Home, and The United Way of the Lakelands. She is an active member of the Greenwood Alumnae Chapter of Delta Sigma Theta Sorority, Inc. through which she completed the South Atlantic Region's Leadership Fellows program. She is a graduate of the Greenwood County Chamber of Commerce's Leadership Greenwood program and is a past honoree of the Connect Young Professional's Greenwood Under 40 Stars. Teresa successfully co-chaired the 2017 Women's Leadership Upstate Conference. A recognized Paul Harris Fellow, she is a member of the Rotary Club of Greenwood. In 2021, Teresa was named to the 2023 class of the Liberty Fellowship. The Liberty Fellowship is a vibrant community of leaders who have made a lifelong commitment to creating a better future for all people in South Carolina and is part of the Aspen Global Leadership Network. A proud third-generation HBCU graduate, Goodman has earned both a Bachelor of Arts degree in Psychology and a master's in Individual & Family Development from South Carolina State University and obtained a second master's degree in Management and Leadership from Webster University. She considers her most precious duties being the wife of Derrick and mother to Xavier.

Brie Goodwin – Robeson County Church and Community Center (Lumberton, NC)

Brianna Goodwin is the Executive Director of the Robeson County Church and Community Center. She has been with the Center for four years including her previous role as Director of Operations. What she loves most about her position is the ability to influence Robeson County's initiatives to bring its residents out of cycles of poverty and bridge the gap for those who are in a time of desperate need. In 2021 she was named as an honoree of the Fayetteville Observer's 40 Under 40 Award, which highlights professionals throughout the region who excel early in their careers. She has served in numerous community roles and is past Chair of Kiwanis Young Professionals of Robeson County, President of the Robeson County Arts Council, President of the Robeson Family Counseling Center, Vice-President/Co-Founder of Ministers for Justice, and a member of the Main Street Lumberton Design Committee. Brianna also runs two small businesses, Brianna Goodwin Art and Brianna Goodwin Photography, and recently landed her first solo exhibition at the Carolina Civic Center Historic Theater, selling a record seven original pieces from her series "Emerge," an abstract collection that explores the transformational periods of an individual's life.

Giany Guedjo – Carolina Human Reinvestment (Georgetown, SC)

Giany is originally from Benin, West Africa. He moved to the United States in 2009. He officially became a US citizen in December 2014. Giany has a bachelor's degree in Economics and a master's degree in Organizational Management, and he earned a Master of Business Administration degree from Webster University in 2011. Giany joined the Carolina Human Reinvestment (CHRSC) as Executive Director in June 2012. Under his leadership, the organization has developed programs that are serving thousands today in the Georgetown County communities. Giany is a graduate of the Leadership Georgetown County program, Class XXV and the Waccamaw American Leadership Forum, Class V. Giany is a member of the Pawleys Island Lions Club. On April 28, 2022, during a regional conference, Giany was recognized as a Melvin Jones Fellow by the Lions Club International Foundation, the highest form of recognition to acknowledge an individual's dedication to humanitarian service. Giany is married to Lisette and adores son Mael (14) and daughter Jessica (12). In his spare time, Giany loves to travel and watch movies.

Jovonia Lewis – Empowered Parents in Community (Durham, NC)

As a counselor and community education advocate, Jovonia Lewis embraces and lives the saying of Dr. Maya Angelou, "When you learn, teach." Her heart for education, empowerment, and social justice led her to this work. As a parent who experienced inequity in her child's school and countering the opportunity gap, she was determined to advocate for her three sons who attend Durham Public Schools to make sure all marginalized children are seen, affirmed, and heard. In 2019, she founded Empowered Parents in Community to dismantle systemic racial inequities in the education system. In addition to her race equity in education work, Jovonia has served on the PTA, the Durham Public Schools Foundation, and the City of Durham's Race Equity Task Force. In July 2020, she was sworn in as a school board member with Durham Public School's Board of Education. And in 2021 she became the Vice-Chair. Jovonia is a wife, mother, and nationally certified and licensed clinical mental health counselor with her undergraduate degree in Psychology from UNC-Greensboro and Master of Science degree in counseling education from Georgia State University. Through various volunteer roles and advocacy, she works tirelessly to share her talents and gifts with others.

ReZsaun Lewis – Lowcountry Youth Services (Hanahan, SC)

ReZsaun Lewis is a husband, father, veteran, educator, and community leader. A proud native of North Charleston, South Carolina, ReZsaun has used his experience as a veteran of the US Army to become a leader and serve his community in many ways, holding various roles and titles throughout his life. Through his work with Lowcountry Youth Services, he has established himself as one of the preeminent voices in youth development programs and nonprofit organizations. He resides in Summerville, South Carolina, with his wife, Latoya, and their five children. He is a graduate of Trident Technical College (Associate in Arts). At the College of Charleston, he earned his Bachelor of Science in Elementary Education. He earned both these degrees as a recipient of the Call Me Mister Program Scholarship. He also completed his Master of Public Administration degree from the College of Charleston. His love for children led him into a career as a teacher and youth development. Since 2019, ReZsaun has served as the Executive Director of Lowcountry Youth Services. The organization's mission is to make sure that "Every Child Wins" through the creation and implementation of youth empowerment programs and community workshops.

Angela McDuffie – Midlands Fatherhood Coalition (Columbia, SC)

Angela McDuffie is in her 22nd year as a Fatherhood Practitioner. As CEO of Midlands Fatherhood Coalition (MFC), she governs operational and programmatic services and ensures fidelity for this organization. MFC's goal is to help men in our communities become great dads. MFC provides holistic services that help connect fathers to the resources they need so they can meet their responsibilities and secure their parental rights. When fathers are able to contribute to the positive support of their children both physically and emotionally, children thrive. Angela is a graduate of the University of South Carolina with a Bachelor of Arts Degree in Psychology and Webster University with a master's in Counseling. She is a trained family Court Mediator for the State of South Carolina and received her certification for nonprofit management from Winthrop University in 2019. Angela is happily married and is the proud mom and bonus mom of three.

Casey Owens – Bertie County YMCA (Windsor, NC)

Casey Owens was born and raised in Bertie County. He attended and graduated from Bertie High School and went on to attend Elizabeth City State University (ECSU) on a football scholarship for the Vikings. Owens graduated from ECSU in 2011 and was a Dean of Students at a charter school before accepting his role as CEO/Executive Director at Bertie County YMCA. Bertie County YMCA has been in establishment for over 20 years but, in the last 6 years under the direction of Owens, has really made huge steps in being the outlet for the youth and promoting physical fitness for all. Since Owens has been the Director, the YMCA has implemented over 14 programs, from the mental health walk, boot camps, night yoga, and more. One of the major programs is the summer camp, Camp Happy, which has grown tremendously over the past few years. In the first year (2016) it served 16 participants, and in 2019 it served 137. The special thing about Camp Happy is that half the staff that works the camp are licensed teachers to assist with the enrichment program that's taught during summer camp.

Angelica Santibanez-Mendez – Salud Sin Fronteras (Wallace, NC)

Angelica Santibanez-Mendez is a highly committed and multifaceted professional driven by the accomplishments of her team. Angie is the founder and Executive Director of Salud Sin Fronteras, an organization focused on empowering the Hispanic/Latinx, immigrant, and refugee community of southeastern North Carolina through health education, outreach, and resource connections. Her career is distinguished by her community involvement, public speaking, and creative vision. She is recognized for her unparalleled work ethic and proven expertise in building and maintaining strong partnerships that achieve set-forth goals, as well as creating focused programs that meet organizational objectives for diverse populations.

Norma Jean Suarez – Unity Health on Main (Greenville, SC)

Norma Jean Suarez joined the staff at Unity Health on Main in December 2016. In her role, she is responsible for implementing the strategic goals and objectives of this nonprofit community health center whose mission is to continuously improve the overall health and well-being of the medically under-resourced populations it serves by expanding access to quality healthcare through community partnerships. Before Unity Health on Main, Norma Jean served as General Manager for Holiday Retirement, a senior independent living community in Greenville, South Carolina. Originally from Texas, Norma served as Director of Operations for Bexar Management Development Corporation, where her team was responsible for the development and growth of new business and programs, as well as Vice President of Programs for SAMMInistries, where she was responsible for the clinical, fiscal, and program management of multiple homeless services including an 850-bed emergency shelter, 160-bed transitional living facility, 25 scattered-site houses, 80 scattered-site apartments, rapid rehousing and prevention services, and Education and Employment Development. Additionally, Norma Jean served as Clinical Data Program Manager with First Nations Community Healthsource, a Federally Qualified Health Center in Albuquerque, New Mexico. While with First Nations, she provided management and direction to programs and operations to include budget preparation, staffing, strategic planning and marketing, program development, quality improvement, and compliance with all pertinent government regulations and standards. Norma Jean earned a master's degree in Business Administration and her master's degree in Counseling from Webster University. Norma Jean is also a Licensed Mental Health Counselor (LMHC) and a graduate of Leadership Greenville.

Weyling White – Care Share Health Alliance (Ahoskie, NC)

Weyling White is the Executive Director of Care Share Health Alliance, a statewide nonprofit with the mission of “collaborating for health equity.” Weyling was born and raised in Ahoskie, North Carolina, where in 2019 he was sworn in as the first African American and second-youngest Mayor for the Town of Ahoskie. Weyling graduated from Winston-Salem State University, where he would become a member of Alpha Phi Alpha Fraternity, Inc. and receive his Bachelor of Science in Exercise Science. Upon graduation in 2008, Weyling returned home to Ahoskie with a personal mission to give back and use his talents for the betterment of his community. He obtained his Master of Business Administration in Healthcare Management from the University of Phoenix in 2010. He is a Class XXV graduate of the Rural Economic Development Institute with the North Carolina Rural Center and Class XXVI graduate of Leadership North Carolina. His work with the Hertford Health Maintenance Alliance in Hertford County has helped numerous uninsured residents living in Hertford and Bertie Counties receive free or discounted healthcare services. In this role, he founded the TRIP transportation program, which is still in operation and has provided patients with free rides to medical appointments and other resources. Weyling was recognized nationally in 2017 as the Emerging Leader in Healthcare Transformation by the Communities Joined in Action and selected as a Jim Bernstein Health Leadership Fellow for 2019–2022. His current work with Care Share Health Alliance involves supporting Medicaid Transformation and advancing health equity efforts across North Carolina.

Appendix 4

Participating Members of the Program Design Workgroup

The Program Design Workgroup comprised two funders, both of whom were part of the Pre-Program Design Workgroup, and four fellows, two of whom participated in the Pre-Program Workgroup. The Program Design Workgroup met from August 2022 through May 2023 and was responsible for helping shape the content of the virtual and in-person sessions, as well as providing feedback on the overall theory of change for ILOC.

Representatives from North Carolina foundations

Shelia Reich, BlueCross BlueShield Foundation of NC

Representatives from foundations serving both North and South Carolina

Tamika Williams, The Duke Endowment

Leaders / inaugural fellows

Angelica Santibanez-Mendez, Salud Sin Fronteras

Giany Guedjo, Carolina Human Reinvestment

Phyllis Caldwell-George, Financial Pathways of the Piedmont

Teresa Goodman, Community Initiatives, Inc.

Appendix 5

2022–2023 Fellowship Activities

May 2022

Funders and fellows gathered in Charlotte for the first time for the program launch with dinner and a reception. Fellows completed an initial organizational assessment to identify organizational strengths and opportunities.

June 2022

Funders and fellows gathered in Charlotte for the first three-day session focused on aligning the full group on what the fellowship is, setting group norms, providing initial technical assistance for the fellows, and exploring how we show up in our respective roles in our personal and professional lives.

July 2022

Fellows gathered virtually to work on storytelling. Five fellows told the stories of their communities and refined narratives that help define who and where they are. They received feedback from MDC's Director of Communications, Clarissa Goodlett, and other fellows.

August 2022

As a follow-up to the July session, the remaining seven fellows shared the stories of their communities and personal narratives, with feedback from Clarissa and their peers.

September 2022

Funders and fellows gathered in person to build community, review similarities and areas of opportunity from the organizational assessment completed in May, and engage in peer consultancies over the course of three days. The group met with members of the Northside Development Group and reflected on the dynamics of funder–nonprofit leader relationships and the important role that trust plays.

October 2022

Fellows met virtually to determine whether they would use Resilia's services, while funders met separately to continue a discussion about a funder-focused set of activities. Fellows and funders came together to identify funding streams by region of interest to strengthen organizational resource development.

November 2022

Fellows met virtually with Dr. Shawn Edwards to discuss the framework and purpose of strategic planning from an internal organizational perspective and an external leadership perspective.

December 2022

Fellows and funders gathered virtually to reflect on the fellowship thus far. Fellows shared pictures that represented what ILOC meant to them. Fellows also participated in a virtual gingerbread house competition, where funders voted to determine who would win a staff lunch sponsored by MDC.

January 2023

Fellows, funders, and foundation CEOs gathered in Charlotte for three days to reflect on themes of rest and resilience. Select CEOs reflected on their foundation's racial equity journey as well as their own personal equity journeys. Fellows and funders checked in on their STP relationships, and fellows reflected on the importance of rest in sustaining themselves and their organizations.

February 2023

Fellows gathered virtually to learn more about Candid's foundation database and participate in peer consultancies to identify possible approaches to dealing with organizational challenges. Fellows also provided insight on activities for the final in-person celebration in May.

March 2023

Fellows and funders gathered virtually to hear from funders about the real-time impacts of standing for equity. Funders shared reflections on their personal motivations for pushing for systems change, balancing being a leader and being an ally, and the way that ILOC has changed how STPs feel accountable for the larger impact of their foundation's work.

April 2023

Fellows gathered virtually to discuss building organizational power, wealth, and sustainability with NC 100 founder Merald Holloway and CoThinkk founder Tracey Greene-Washington. Fellows discussed funding opportunities outside of foundation grants like Heir Shares, the Community Reinvestment Act, giving circles, and leveraging public-private partnerships.

May 2023

Fellows, funders, CEOs, and fellows' board members met in Charlotte for two days to celebrate the closing of the inaugural fellowship year. Fellows shared their reflections on their experiences with ILOC with an eye toward their continued participation as alumni of the program. All participated in a tour of Charlotte's Westside with Charis Blackmon, of Westside Land Trust, and heard reflections about the state of philanthropy from Geoffry Canada at the final celebration.

Appendix 6

Strategic Thought Partners (Funder-STPs)

- Debbie Aiken, Anonymous Trust
- Edie Blakeslee, Coastal Community Foundation
- Caitlin Burke, Z. Smith Reynolds Foundation
- Stephanie Cooper-Lewter, Kate B. Reynolds Charitable Trust
- Veronica Hemingway, Coastal Community Foundation
- Meredith Mathews, Sisters of Charity Foundation
- Mamie Nicholson, Self Family Foundation
- Chynna Philips, Sisters of Charity Foundation
- Shelia Reich, BlueCross BlueShield Foundation of NC
- Meka Sales, The Duke Endowment
- Valerie Stewart, BlueCross BlueShield Foundation of NC
- Tamika Williams, The Duke Endowment

Appendix 7

MDC Equity Centered Leadership & Philanthropy Team *(includes past and present team members that supported ILOC)*

- Calvin Allen, Vice President for Partnerships and Programs
- Marilyn Boutte, Program Coordinator and 2022-23 Autry Fellow
- Kierra Clark, Program Manager
- Kerri Forrest, Senior Program Director
- Sofia Molina, 2021-22 Autry Fellow
- Susan Nobblitt, Program Manager
- Nina Rivers, Program Administrator
- John Simpkins, President
- Stephanie Walker, former Program Director (retired)

Appendix 8

2022–2023 Assigned Readings

Over the course of the program, fellows were assigned a number of different readings to help expand their thinking about their personal leadership journey and issues they have to navigate within their organizations or communities.

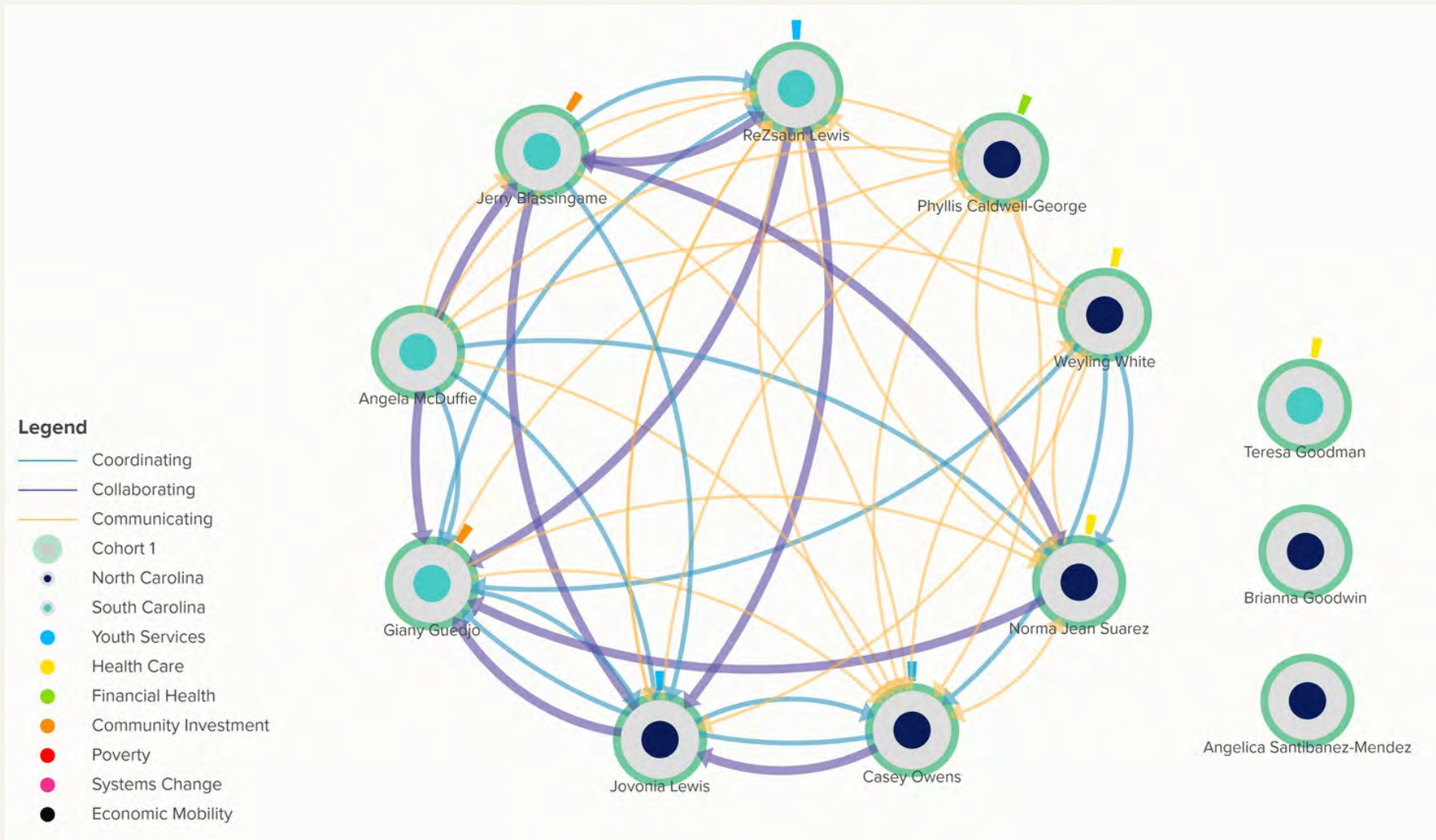
Readings included:

- “We Wear the Mask,” Paul Laurence Dunbar (June 2022)
- “Shooting an Elephant,” George Orwell (June 2022)
- “To Live in the Borderlands,” Gloria Anzaldua (June 2022)
- “That’s Not Actually True,” by Kiese Laymon in *A Measure of Belonging* (June 2022)
- “Where Do We Go from Here?” speech, Dr. Martin Luther King, Jr. (January 2023)
- “We Were Made for These Times,” Clarissa Pinkola Estes (January 2023)
- *Rest Is Resistance*, Tricia Hersey (January 2023)

Appendix 9

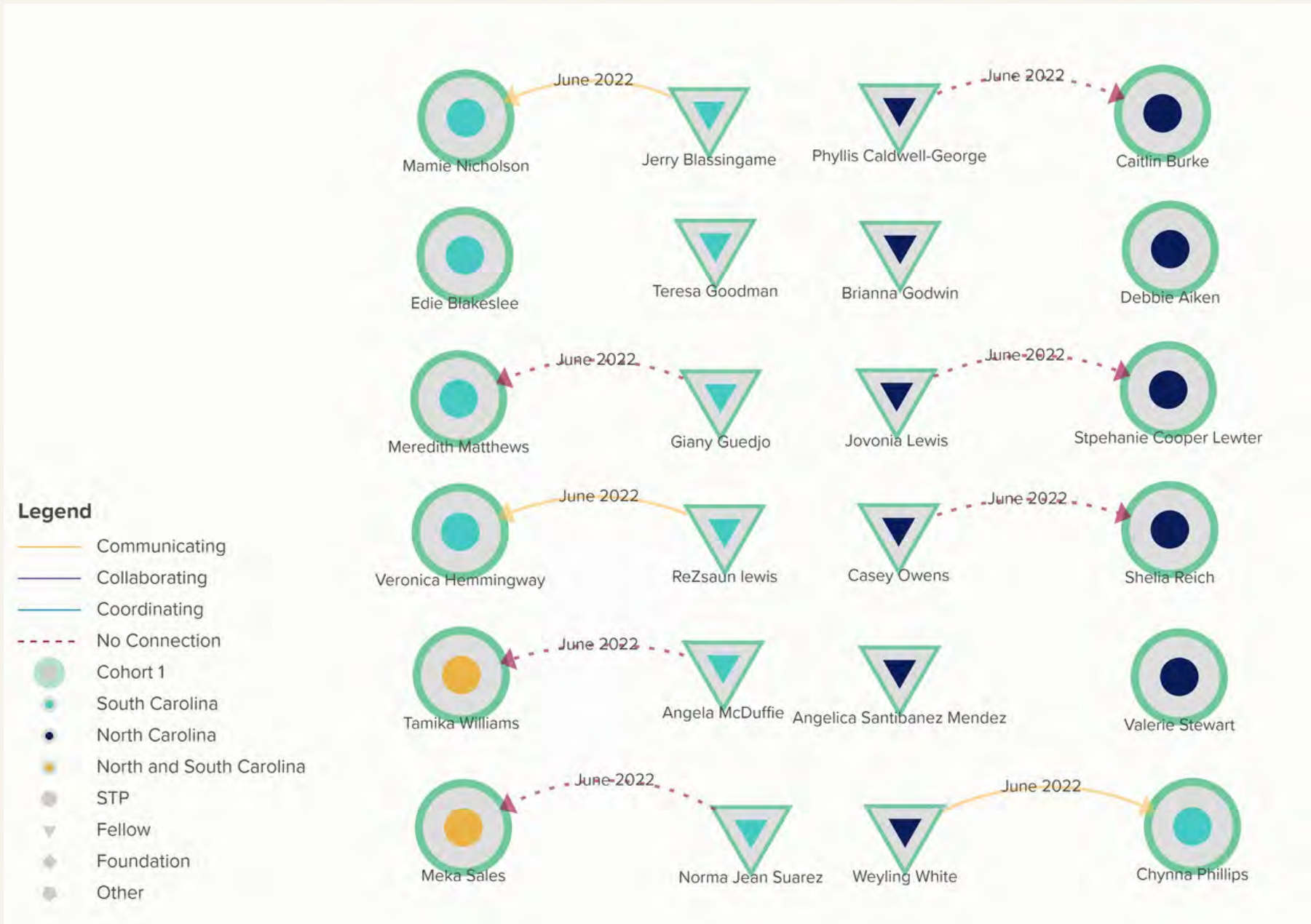
Network Maps

Map A: Fellows Network Map illustrating fellows' relationships with each other at the conclusion of ILOC (May 2023)



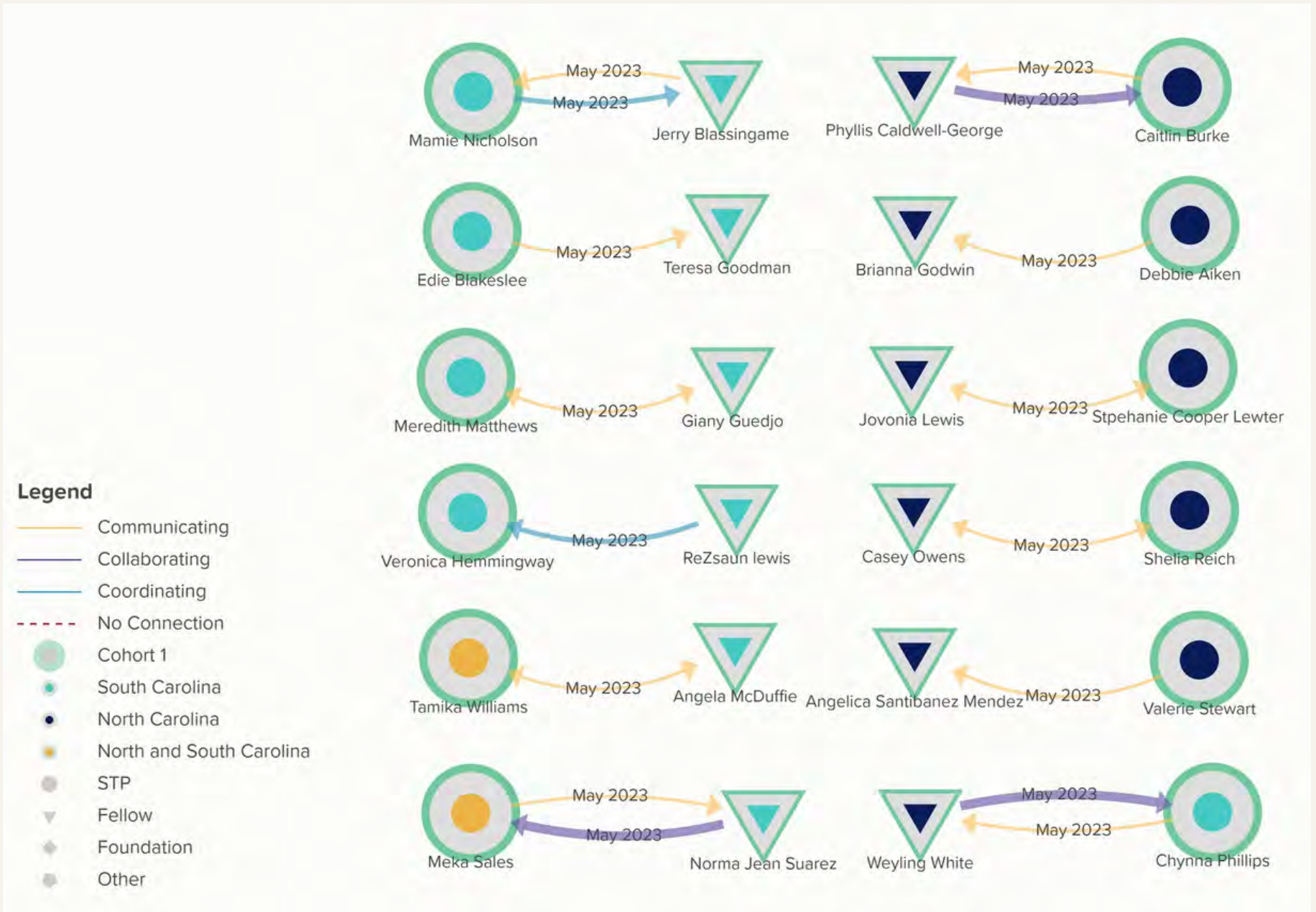
The three fellows without any connections on the network map (Teresa Goodman, Brianna Goodwin, and Angelica Santibanez-Mendez) did not complete the survey with information about their relationships with other fellows.

Map B: Fellow-Funder-STP Network Map illustrating fellows' relationships with funder-STPs before ILOC (June 2022)



The three fellows without any connection arrows on the network map (Teresa Goodman, Brianna Goodwin, and Angelica Santibanez-Mendez) did not complete the survey with information about their relationships with funder-STPs.

Map C: Fellow-Funder-STP Network Map illustrating fellow-funder-STP relationships at the conclusion of ILOC (May 2023)



The three fellows without any connection arrows on the network map (Teresa Goodman, Brianna Goodwin, and Angelica Santibanez-Mendez) did not complete the survey with information about their relationships with funder-STPs.

Map D: Funders Network Map illustrating funder-STP relationships at the conclusion of ILOC (May 2023)

