Centering Racial Equity and Justice in the Work of a Place-Based Foundation: Victoria Foundation’s Journey

By Lauren Wells, Ph.D.
**Historical Context**

Hendon Chubb founded Victoria Foundation in 1924 with $20,000 of his personal income. He named the foundation after his mother, Victoria, and established from the start that it would be “devoted entirely to charitable purposes” and provide “assistance and help for human needs and misfortune.”1 When the foundation was started, there were 126 private foundations in the United States. Today, after 97 years of grantmaking, Victoria Foundation has matured into one of the oldest private foundations in the nation, one of 73,000.

Hendon served as president of the foundation for 36 years, inviting his family and close friends to join him in this endeavor as board members. Together, they established a foundation focused on northern New Jersey, where aiding existing organizations and addressing unexpected needs beyond the scope of board policy became the twin pillars of its grantmaking. Victoria has grown from a small family foundation operated and managed by volunteer trustees into a mid-sized philanthropic organization with an endowment of $300 million, 160 grantees, and eight full-time employees. Hendon’s commitment to putting a portion of the personal fortune he acquired in the family-run Chubb & Son Insurance Company to work on improving the lives of others remains the hallmark of the foundation.

For most of Victoria’s history, the board has been led by members of the Chubb family. Hendon recruited his wife, children, and close friends to the board, and they managed the foundation’s operations and grantmaking in its early years. Percy Chubb II became the president of the board when his father Hendon passed away in 1960. From 1960 to 1982, Percy II steered Victoria into a period of professionalization; the board began to elect members outside of the inner circle of family and friends and recruited two Black community leaders. In this era of its development, the foundation also implemented a committee structure, hired Howard Quirk as its first full-time director, and shifted its focus to Newark as a place-based foundation. Percy Chubb III, Hendon’s grandson, amplified this shift when he was elected board president after his father’s death in 1982, continuing to diversify the foundation’s board and substantially increasing its grantmaking activities in Newark. In 2012, under the board leadership of Percy III, the foundation relocated its headquarters to Newark with an eye toward strengthening relationships with its grantees and developing a more localized understanding of community needs. After the move to Newark, Percy III departed from tradition and stepped down as board president. Kevin Shanley, a close family friend, was named to replace Percy III and served until he also resigned due to illness. Frank Alvarez, currently the sitting president, was elected in 2014. Frank is the first board president elected from outside the family circle and the first person of color to assume the role.

---

1 Cooper-Bosch, Irene. (2014). The evolution of Victoria Foundation from 1924 to 2003, with a special focus on the Newark years from 1964 to 2003 (Doctoral dissertation, Rutgers University), p. 95.
From 1924 to 2020, Victoria awarded $339,505,800 across a total of 7,500 grants and spent $38,067,000 on operating expenses. Since its beginnings, the corpus has grown from Hendon’s original $20,000 investment to just over $300 million in 2020. Total annual grantmaking has increased from $2,000 in 1924 to $12,700,000 in 2020. Victoria’s approach to grantmaking has continuously changed and evolved. In its earliest years, before most government aid programs existed, the foundation provided direct charity to residents of Essex County, New Jersey, through hardship “loans” that offered assistance for emergencies such as coal, clothing, rent, and even dentures. In 1939, after Hendon’s daughter became ill with rheumatic fever, Victoria established and operated the Children’s Heart Unit, a 24-bed hospital providing care for children with the illness in Morris Plains, New Jersey.

In the 1960s, 40 years after its founding, Victoria began to shift its approach to traditional grantmaking and focus its giving in Newark, New Jersey. A program to close the achievement gap began in 1964 at Cleveland Elementary School in Newark’s Central Ward. This program launched Victoria Foundation’s targeted support for public education in Newark, which remains at the core of its grantmaking to this day. Importantly, in the wake of the 1967 Newark rebellion, the Newark-centric focus likewise fostered a commitment to using funds to rebuild the city. The foundation expanded its support for community development during the 1970s and granted seed funding to spur Newark’s rapidly growing community development corporation (CDC) sector. During this same period, Victoria also initiated new funding to conserve open spaces in critical regions across the state, focusing on protecting New Jersey’s drinking water.

Of the total grants awarded through Victoria’s life span, nearly one-third ($100,125,600) of those funds were awarded between 2010 and 2019. The education arena, receiving 33% of all grants awarded, has been the largest recipient of Victoria’s funding during these years, followed by youth and families (29%), neighborhood development (28%), and environment (10%). Newark Public Schools, New Community Corporation, La Casa de don Pedro, New Jersey Performing Arts Center, and Ironbound Community Corporation were the foundation’s top grantees between 2010 and 2019.
Over the course of its existence, Victoria has evolved from a charity-based organization responding to individual emergencies to a Newark-based philanthropic institution with a clearly defined set of programmatic areas supporting many well-respected organizations. At different junctures along the way, the trustees and staff have consistently questioned the foundation’s approach and impact. Percy II raised the following concern about the breadth of Victoria’s grantmaking in 1976: “In considering the number and diversity of the grants for the year now ending (1976), we may question whether we are scattering our shots too widely and whether we should aim for fewer and more substantial grants.”

This periodic questioning of Victoria’s impact beyond support for individual organizations and programs did not organically surface racial equity and justice as the essential values that should guide the organization’s future and work. The trustees’ awareness of and receptivity to the need for a racial lens to their grantmaking was intentionally cultivated by Irene Cooper-Basch during her tenure as Victoria’s executive officer. It was also increasingly spurred by “a younger generation staff advancing a sharper, more expansive vision of racial justice in the workplace” as they joined the foundation.

Impetus for Change

Now approaching its centennial milestone in 2024, Victoria, pushed by many influences, has challenged itself to redefine and reimagine itself through a commitment to racial equity. Final instructions left by Hendon Chubb during the last board meeting before he died in 1960 afford the trustees broad latitude to institutionalize this lens within the foundation and its work: “I want the work of the foundation to be carried on as seems best in the judgment of the trustees and every decision to be made on the basis of how can the best use be made of the money and not limited in any way by the thought this is what HC (Hendon Chubb) would have wished. I only want it used for human benefit without directions from a dead hand” (VF Board Meeting Minutes, 1960).

The trustees’ decision to propel Victoria’s philanthropy into the racial equity and justice arena was driven by four major factors that guide the trustees’ “best judgment”: impact, diversification of the board and staff, trends in the field, and social context as well as the Thriving Neighborhood Initiative (TNI). Each of these internal and external influences has made a unique contribution to the foundation’s desire to align its vision and investments with a racial equity and justice framework.
Impact

The leading factor pushing Victoria to shift the pendulum of its work was a shared impulse among trustees and staff for the foundation to leverage its funds to impact social conditions more significantly. Hendon’s granddaughter and longest-serving trustee Margaret Parker explained, “I am very proud of the work the foundation has done over these many years. We’ve supported a whole group of organizations doing very important work and doing a great job in Newark. But I have also felt we weren’t hitting anything, any change issues, that we were just giving money to very good organizations doing good programs. And I felt that we might do more.” In line with this thinking, and shortly before the move to Newark in 2012, the foundation’s trustees began to examine its committee structure and refresh its language around the foundation’s mission, priorities, and goals as the means to sharpen their focus on impact.

In 2014, Irene Cooper-Basch, the sole executive officer at the time, completed a dissertation about the foundation’s history and presented her findings to the trustees. The study indicated that while more than 4,000 grants and $146.6 million were awarded to nonprofit organizations in Newark from 1963 to 2003, there was little evidence of sustainable or systemic impact. This presentation reinforced the internal questioning of impact that was already underway within the foundation. Co-executive officer Craig Drinkard and other staff and trustees credited Irene’s dissertation with significantly influencing the board’s thinking about what Victoria could be doing to address systemic issues: “Fast forward a little bit, Irene finishes her dissertation and makes a presentation to the board. She shares with them that we have done a lot of good, but we have no empirical evidence that we’ve had impact. That prompted us to start having board retreats. We started with the first day-long board retreat in 2014.” Catalyzed to begin actively meeting around these insights and questions, the trustees began to hold annual board retreats and learn about sister funders’ transformation efforts. Tonya Allen of Detroit’s Skillman Foundation was tapped to speak at the first board retreat in October 2014. Among the lessons Tonya shared was the importance of longer-term funding commitments leading to sustainable impact, which Skillman learned from its 10-year commitment to the Good Neighborhoods, Good Schools Initiative.
During a 2018 trustee meeting, former program officer and current deputy director of the Panasonic Foundation Mateus Baptista engaged the trustees in the “But Why?” activity to help them develop a better understanding of the factors contributing to the problems they were seeking to impact. This exercise, along with a carefully selected portfolio of learning opportunities, led the trustees to collectively recognize that dealing with the root causes of the problems affecting Newark residents would mean acknowledging and dealing with structural racism. By the end of 2018, the trustees’ initial questions around how to have greater impact with limited resources had advanced into discussion and questions about how to effect systemic change.

Diversifying the Board and Staff

In the foundation’s first 80 years, a total of eight Victoria trustees were community leaders from outside of the president’s circle of family and friends and only three were Black. Since the foundation moved to Newark in 2012, the composition of both the board and the staff has changed dramatically. Today, the board comprises seven people of color, one Newark resident, and six trustees who work in the city. Of the 15 trustees, eight are men and seven are women.

The foundation hired Lydia Barrett Davis, its first Black employee, in the 1980s. In subsequent years, Lydia was followed by Elliot Lee and Reginald Lewis. Over the last five decades, Victoria has recruited, retained, and promoted numerous highly skilled and committed Black employees in senior positions in the foundation. Currently, most of the eight-member staff responsible for the foundation’s daily operations are people of color. The staff includes two Black women and two Black men, as well as a Latinx woman. After a decision to expand its leadership model that occurred during the strategic planning year, Victoria is now co-led by Irene, a white woman, and Craig Drinkard, a Newark native and a Black man.

A cascade of retirements among white women who had each been with Victoria for more than 15 years occurred from 2012 to 2014, creating the opportunity for the foundation to bring in younger staff of color. The growing cohort of younger staff with fewer than five years of service currently at the foundation is of equal importance to the shifting dynamics of the organization’s culture, perspectives, and experiences. When asked to share turning points that have influenced Victoria’s transformation, Jessica Debrah, who joined the foundation as a two-year fellow in 2018, said, “Staff has shifted within the past five to seven years. There’s been turnover, and, historically, there hasn’t been. So, I think that contributed because different people were coming in with different perspectives, different lived experiences, and just different expertise.”

---

3The “But why?” activity is used to identify the underlying causes or “root causes” of a problem. In this activity, participants examine a problem by asking questions to surface causes. Each time an answer is given, it is followed by the question “But why?” to push the thinking to deeper levels. See https://ctb.ku.edu/en/table-of-contents/analyze/analyze-community-problems-and-solutions/root-causes/main.
Another staff member noted, “There's been a lot of staff turnover and, given that not only are you getting many new people joining an organization, but the age is also slightly different. That has also come with its challenges. When I joined Victoria Foundation, I could easily say that the average age was probably 50 something. At one point, it might've even have been 60. Now when I look at the average age, I don't think it's much higher than 40.”

These changes to the board and staff infused the foundation with new perspectives about race, the expertise of lived experiences, and non-traditional views about the role of philanthropy in predominantly Black and Brown cities like Newark. They broadened the aperture through which the foundation understands the significance of race to its grantmaking.

Trends in the Field

The amplification of racial equity and justice as a focus across the field of philanthropy has also shaped Victoria's thinking and evolution over the last decade. As one staff member reflected, “Victoria is swimming in the same waters as the rest of philanthropy and the rest of the social sector. And so as racial equity has been elevated in the public conversation and in philanthropic conversations, I think that intensified conversations that Victoria staff have been having for a few years.” Shané Harris, the president of the Prudential Foundation, which also is headquartered in Newark, shared a similar view: “We are all reassessing how to add value and impact to the work in the context of this emphasis on a racial equity lens. It will require all of us to make changes to our practices in order to be successful.”

The foundation's exposure, however, has not simply occurred due to its proximity to ripples in the field. The amount of attention given to purposefully building knowledge through the active participation of trustees and staff in philanthropic fellowships and shared learning experiences with leadership from sister foundations including the Ford, Babcock, Deaconess, Nellie Mae, Hill Snowden, and Skillman foundations has paid off. First-hand insights from sister foundations seeking to proactively address the root causes of racial inequality, such as those of the Ford Foundation President Darren Walker, have been a particularly notable driver of informing how Victoria views itself and its role in addressing structural racism and inequality in the 21st century.

Thriving Neighborhoods Initiative (TNI)

Initiated in 2018, Victoria's Thriving Neighborhoods Initiative (TNI) included a 7-to-10-year commitment to local partners in two Newark neighborhoods to identify priority projects and build civic capacity. This project evolved out of insights learned from Irene's dissertation, and it has provided essential lessons influencing the foundation's strategic direction. The primary goals of TNI are working with
resident leaders and community stakeholders to target and leverage the foundation’s investments in neighborhoods and increasing resident engagement. Concerned about the power dynamics, Victoria engaged the Greater Newark LISC to lead the work and hire the neighborhood organizers. Real-time findings from an independent evaluator helped the foundation realize that a more nuanced conversation about resident engagement was necessary to understand resident and community needs and to sustain the participation of those closest to the ground. One staff member shared: “TNI expanded the foundation’s thinking beyond resident engagement to building community power. It opened up conversations around what it means to serve community, what does it mean for community to feel like they have a say in their home and their communities, and what does it mean to support folks in building the worlds that they want to build.”

TNI also raised tensions within the foundation’s understanding of the dynamics of systemic change, particularly its pace and speed. It helped the foundation better understand what it means to mobilize resources in ways that build on the civic and social infrastructure that already exists in neighborhoods and communities. TNI demonstrated the importance of taking time to build relationships and trust with residents and communities, so the work is rooted in the knowledge and expertise they bring to the partnership.

Social Context

Discourse about racial inequality and injustice both locally and across the nation has profoundly impacted the consciousness of the foundation’s staff and trustees. Relocating its offices to Newark in 2012 increased the foundation’s exposure to these public discussions. The move deepened Victoria’s understanding of the impact of structural racism and social inequality on the city and its residents. It afforded it a clearer line of sight into what communities in Newark want and envision for themselves.

Since being elected in 2014, Mayor Ras J. Baraka and his administration have racial equity policies and community empowerment as key strategies to transforming the city and the lives of its residents. Through its grantmaking to various city-led initiatives and collective impact efforts, Victoria has interacted with Baraka’s racial justice ideology and approach to social transformation. Sharing his insights about what may have encouraged Victoria’s desire to address racial equity, Baraka suggested, “I think there are a lot of things that are going on here. There are many things that we’re pushing, a lot of stuff that we’re talking about here. Police reform, safety, and things that have happened around education. I think things are moving pretty quickly for folks who are used to tiptoeing through this stuff. We’re going at some of these issues head-on, whether it be guaranteed income or all of this other stuff, that they figured that they need to get it, they need to get involved.”
Board trustee Gary Wingens offered a perspective that signifies the importance of both national and local racial dynamics to the evolution of Victoria’s understanding: “When we started this process, it was well before the George Floyd murder. But, as a place-based foundation focused on Newark, we see stark contrast within Essex County, New Jersey, between the wealthy, predominantly white suburbs and the certainly less than wealthy inner-city in Newark. This led us to be aware that if we’re trying to lift the people of Newark, systemic racism is one of the underlying root cause barriers to success.”

For other trustees and staff, the heightened visibility of systemic issues such as police violence and other public health disparities have also played a role in accentuating awareness of a need to approach their work differently. Planning committee chair Grizel Ubarry explained, “Just when we were starting our planning work, we were impacted by both the pandemic and then racial justice awakening brought on by George Floyd’s death, which further advanced our discussion. We realized we were in the right spot by taking the first step toward embarking on a strategic planning process.”

The onset of the COVID-19 pandemic in the early months of Victoria’s planning year became a major factor in the strategic planning process. Regular COVID-19 reports provided by trustee Dr. Denise Rodgers at trustee meetings throughout the pandemic further highlighted the systemic health and social inequities that placed Newark residents at increased risk of COVID-19. The foundation adapted to the crisis with a savvy outlook, deploying a rapid response grantmaking strategy to support local COVID-relief efforts and embracing the increased opportunity for assessment and reflection by extending the work from a calendar year to an 18-month process. Leaning into trust-based philanthropy, the trustees authorized the shift of all previously awarded grants to general operating funds or any other need grantees identified in response to the pandemic. These factors have synergistically led Victoria to an inflection point in its history. Addressing the root causes of oppression, poverty, and racial injustice have become more important to the foundation than maintaining a traditional approach to philanthropy. Senior advisor to the Maher Family Foundation Barbara Reisman, a fellow philanthropic leader in the Newark community, reflects on Victoria’s grantmaking: “They made generous and relatively traditional philanthropic investments in Newark—supporting programs in arts, education, affordable housing.” About Victoria’s pause and planning year, Barbara said, “My understanding is that they are trying to transform their grantmaking process so that it is more focused on achieving racial equity and distributing power differently to do that.”

**Getting Primed for Strategic Planning**

Recognizing the need to create protected time and space for the organization to immerse itself in reflection, Victoria paused all grantmaking activities during 2020. In so doing, it was essential to the trustees and staff to hold the foundation’s grantees harmless during the pause. Therefore, the trustees determined
that all existing grantees would be awarded two-year grants in 2019. The staff embarked on an extensive communications strategy to ensure that grantees were well-informed.

The foundation’s work was ungirded by the question, “If we focus on the root causes of generational poverty, which in a majority Black and Brown city like Newark stem directly from decades of disinvestment and structural racism, can we center our work more in community and deploy our funding in ways that will realize greater impact with our resources?” Guided by this question, Victoria staff and trustees participated in an array of learning activities and engaged consultants to help them reimagine Victoria as a foundation focused on addressing the root causes of racial inequity in the city of Newark. To make this decisive pivot in their work, the staff established a “roadmap” pinpointing the major steps and milestones for the work the foundation would undertake. Included in the roadmap was an internal analysis of every aspect of the foundation’s grantmaking and investment activities; professional learning and training; interviews with staff, trustees, grantees, and other key stakeholders; and reviews of reports, grant write-ups, minutes of meetings, and other archival materials.

The idea of pausing for internal assessment and planning percolated in the foundation for several years before the board formally initiated Victoria’s one-year sabbatical. The recent participation of numerous staff and trustees in various racial justice fellowships energized the call for reflection and recalibration. Co-executive officer Irene Cooper-Basch, who has been with Victoria for 18 years, was instrumental in moving the trustees in this direction and shaping how the foundation would design its planning activities. Irene integrated the learning and relationships she acquired as a participant in the first cohort of the Philanthropy Forward Fellowship, a CEO fellowship program created by Neighborhood Funders Group and the Aspen Institute Forum for Community Solutions, into Victoria’s thinking about how to approach its planning. She sought to help the organization “look at the possibility of impact, root causes of poverty, and employing a racial justice lens.” Irene’s leadership has been a pivotal factor in challenging the trustees to incorporate a systemic lens into how they view the foundation’s grantmaking.

In the year leading up to Victoria’s pause, a calendar of purposefully curated racial justice learning activities was developed for trustees and staff. Planning committee chair Grisel Ubarry reflected on the planning year: “We decided that we shouldn’t rush into the strategic plan. Instead, we decided to spend some time on education to allow everyone to be on the same level playing field to be able to talk about these issues in a more intentional way. And so, that’s what we did. We spent a year just creating various opportunities for board members and staff to gain some knowledge and experience prior to making the hard decisions that go with any strategic planning process.”

Early in 2019, staff and trustees read Anand Giridharada’s book Winners Take All: The Elite Charade of Changing the World. They also met with Darren Walker, the president of Ford Foundation, and Aaron
Dorfman, the president of the National Committee for Responsive Philanthropy, at the Ford Foundation Center for Social Justice in New York City. Darren shared Ford’s work to address racial injustice at this meeting, and Aaron discussed the importance of philanthropic support for community organizing in cities like Newark. During this same time period, several staff members, including co-executive officer Craig Drinkard (formerly deputy director), program officers Jessica Debrah and Stephanie Greenwood, and trustee Grizel Ubarry, participated in the six-month Justice Funders Fellowship. The entire staff participated in two training sessions about racial equity, implicit bias, and anti-racism.

In April 2019, the trustees convened for a full-day board retreat where Reverend Starsky Wilson, CEO of the St. Louis-based Deaconess Foundation, and its board chair, Jeff Davis, were the featured speakers. Their discussion focused on the foundation’s transition to community action for racial justice. It highlighted the importance of ensuring a transition that does not cause harm to grantees and engaging community voices in the process. It was at this retreat that Victoria’s trustees unanimously agreed to award two-year grants to 2019 grantees so the foundation could focus its attention on additional learning, reflection, and planning during 2020. The four goals for the planning year also emerged during this significant retreat: to investigate and consider alternative strategies that have potential to increase the impact of grantmaking, address root causes of poverty, meaningfully engage residents, and build capacity of grassroots groups working to shift past and current policies and systems that negatively affect children and families in Newark. After the retreat, trustees and staff continued to glean lessons and aggregate takeaways from sister foundations across the nation as a part of their learning journey. Key among these insights were funding smaller, more nimble grassroots organizations, ensuring community voices influence foundation practices, shifting from scattershot to strategic grantmaking, and developing an explicit understanding of racial equity.

As 2019 entered its final quarter and the pre-planning activities came to a close, the foundation staff convened for a two-day overnight retreat at Frost Valley YMCA camp. This facilitated session led by Kendra Hicks, Director of Radical Philanthropy at Resist, Inc., focused on understanding racial equity, racism, implicit bias, and the social construction of race.

**2020: The Planning Year**

Eager to learn from its grantees, Victoria launched its planning in 2020 with an extensive survey to grantee leaders about their organizations, perceptions of the issues facing the city of Newark and the communities they serve, and ideas and insights about racial equity. The survey was administered by Creed Strategies, a Black-woman-led and Newark-based consulting group. Surveying 100 grantees, findings from the study highlighted that Black and Latinx people held less than 35% of all board positions and CEO/executive director positions at Victoria grantee organizations,
and 65% of board chairs lived outside of Newark. These findings prompted the foundation to examine Black and Brown-led grassroots groups’ role in addressing injustice. In the planning work, the foundation sought “to ensure that relationship building, partnership, and collaborative learning with grantees and stakeholders are core to how Victoria Foundation positions itself and designs its racial equity work.”

According to Irene, the planning year was characterized by “prioritizing the time for learning and planning over the time set aside for foundation business.” A planning committee made up of seven trustees was established to guide the planning process and do the board’s heavy lifting. A subset of the staff also formed a Staff Liaison Team to act as the intermediary between the staff and the strategic planning consultants.

The learning activities initiated during the pre-planning year continued and deepened during the planning year, including more opportunities for staff and trustees to engage in collective learning. For example, trustee Robert Clark, co-executive officer Irene Cooper-Basch, and program officer Jessica Debrah participated in the Dodge anti-racism series Learning to Applied Practice: Anti-Racism and Anti-Oppression from November 2020 through March 2021. This emphasized the importance of trustees and staff participating in collective learning to the foundation’s change process. All the staff and six trustees completed the Intercultural Development Inventory (IDI), a cross-cultural assessment tool used by organizations around the world to gauge cultural competence or “the capability to shift cultural perspective and appropriately adapt behavior to cultural differences and commonalities” (IDI, website).

Victoria staff joined the Dodge Foundation staff in a three-day training by the Interaction Institute for Social Change to develop facilitation skills for social change and increase their ability to engage authentically with people across different backgrounds. The book club, which started during the pre-planning activities, read and discussed the significance of Robin DiAngelo’s book White Fragility: Why It’s So Hard for White People to Talk About Racism to the strategic planning work.

The training and learning experiences offered to trustees and staff during the pre-planning and planning years afforded them broad exposure to the beliefs and practices core to racial equity in grantmaking. Though these opportunities did not necessarily build on each other sequentially or involve staff and trustees equally, they did influence the development of the new strategic framework and the foundation’s understanding that

---

racial equity and justice work is deep, long-term, and iterative. Victoria is still early in its development of an internal culture that reflects agreement on core values. As such, it will grapple with the challenge of getting to the depth and scope of learning that addresses the continuum of learning needs among its trustees and staff as it continues this work.

**Bringing on the Right Consultants to Guide the Strategic Planning Process**

The planning committee and staff collaborated to select the consultants that would guide their strategic planning process. After an RFP and interview process, Frontline Solutions, a Black-founded and led consulting firm that engages organizations in applying a racial equity and justice lens to organizational change, was selected to steer the foundation through redefining its vision, mission, values, and strategic goals. Trustee Robert Clark described a deliberative selection process: “There were three firms. It came down to two. We ultimately chose one, which was Frontline Solutions, in part because of their leadership and their bench. They had a depth on their team of folks who have been working to facilitate this type of thinking and work within organizations and some other foundations.” Trustee Margaret Parker described the process this way: “We hired a group to help us to put together a new description of ourselves, change our mission, and our whole statement about what we were about.”

The Frontline team, Marcus Littles and Brandon Williams, commenced working with the staff and the planning committee in September 2020. Together, they mapped out a three-part process that would involve every level of the organization in redefining its vision, mission, and values and establishing new strategic goals for grantmaking. Frontline immersed itself in getting to know the foundation. The consultants met one-on-one with Grizel Ubarry, the planning committee chair, as well as with staff and planning committee members to develop an understanding of the internal dynamics of the organization, ideate around the hopes and expectations of the new strategic framework, and gather information about Victoria’s current practices and priorities. Craig Drinkard described the launch of the work: “From the beginning staff eagerly engaged with Frontline and provided their keen insights about what they believed the new strategic plan should focus on and what would make this process successful.”

**The Strategic Planning Process**

Frontline was introduced to the trustees at a board retreat held in October 2020, where they immediately engaged the trustees in brainstorming about the foundation’s core values, vision, and mission. In breakout groups dedicated to each area, trustees were encouraged to think creatively and expansively in these areas about the future of Victoria and the contributions and impact they hoped to make in Newark by adopting a racial equity framework. Staff took notes in each breakout group, and the minutes from the retreat reflect
thoughtful and focused responses from the trustees, as well as honest and authentic dialogue about their ideas. For example, in a discussion about the vision, trustees began to question whether “trustees’ vision (for example, a dream of racially integrated neighborhoods) or the vision of Newark residents themselves (which may well differ) should guide the foundation’s work” (VF Board Meeting Minutes, October 2020). In what appears to be a defining moment in the trustees’ collective understanding of racial equity, one trustee stated, “Maybe our wildest dream is that the population of the city is able to achieve the vision it has for the city of Newark and feel support from the institutions and structures in place to be able to do that.”

After eliciting trustees’ ideas and input at the launch retreat, Frontline conducted a strategic planning survey and conducted a series of interviews. Based on this data and on earlier data from the grantee survey and community stakeholder interviews, drafts of the new mission, vision, and values statements were presented to the trustees at the January 2021 board meeting. At this meeting, Dr. Sherece West-Scantlebury, the CEO of Winthrop Rockefeller Foundation, shared her insights about Rockefeller’s shift toward equity and described the equity-focused priorities that emerged. Victoria’s trustees gleaned several significant lessons from the Rockefeller presentation, which are evident in the foundation’s new strategic framework. Of particular salience are the importance of being “disruptive to systems of inequality” and the criticality of internal changes that institutionalize accountability for racial equity within the foundation—such as grantmaking policies, continuous learning, and board composition and terms—to actualizing the vision (VF Board Meeting Minutes, January 2021).

A strategic plan framework draft was presented for the trustees when they reconvened in February 2021. In addition to the updated mission, vision, and values statements, Frontline introduced strategic goals, program area drafts, and tools for accomplishing the big goals. Not surprisingly, the trustees were very attentive to language. A touchstone of this meeting, and a theme throughout the process, was a discussion about the importance of explicitly naming “Black and Brown” residents as the intended beneficiaries of Victoria’s grantmaking to signify the foundation’s solidarity with the most marginalized communities. Trustees also highlighted the need for the language included in the goals to be actionable, both in terms of the budget and the capacity of the organization. The scrutiny of the language and its intent capture some of the growth that the racial equity learning opportunities were designed to promote among trustees and staff. Jessica Debrah aptly captured this goal, stating, “When we began this process, the expressed goal was for all of us to collectively move along on the spectrum of deconstructing and understanding racism and its impacts. Victoria’s leadership and staff understood we needed a common lexicon to engage with one another: for everyone to understand what we mean when we say racial justice, anti-racism, oppression, or liberation. The hope was with this increased critical consciousness we would be able to shift our practices as an institution to truly stand in solidarity with Newark and shift our resources to its residents.”
Frontline facilitated two additional retreats with the trustees in April and May of 2021. They also reached outside of the foundation to conduct a series of interviews with a cross-section of stakeholders in order “to get a sense of the foundation’s current culture and priorities, audiences and beneficiaries, and strategies and growth areas” from an external view (Frontline, 2020). Throughout the strategic planning process, Frontline analyzed and synthesized data from the internal and external interviews, surveys, retreats, and grantee surveys conducted by CREED Strategies to design Victoria’s racial equity strategic framework.

At the same time that the strategic planning work was underway with Frontline, the ESG (environment, social, and governance investing) exploratory process was moving on a corollary track. During the December 2020 trustee meeting, trustees met with representatives from Morgan Stanley, Victoria’s investment firm, about ESG and impact investing and highlighted “maximizing the connection between an organization’s mission and its investment capital (in order to) generate a measurable, positive social impact along with a financial return” as the goal of this type of investing (VF Board Meeting Minutes, December 2020). In addition to presenting key terms, the history of ESG, and examples of different kinds of impact investing to the trustees, the Morgan Stanley representatives shared a preliminary analysis of Victoria’s existing investments and their alignment with the foundation’s mission. The initial review of the foundation’s investments showed that although some investments already appeared to align with the foundation’s values, there was room for improvement in other investment areas. The presentation generated a discussion among trustees about what they should consider regarding ESG investment strategies. This presentation and ongoing consultation with Morgan Stanley set the stage for the trustees to consider impact-driven policy decisions about what investments should be included or excluded from Victoria’s endowment as the new strategic framework is implemented. Trustees initiated an ESG Investing ad hoc committee to engage in additional learning opportunities from sister foundations and bring policy recommendations to the full board.

Another issue that Victoria’s trustees grappled with during the strategic planning process involved the foundation’s bifurcated mission, which included a small percentage of annual grant funding (7 to 10%) to support statewide environmental land conservation and advocacy. Staff researched and wrote a report for trustees that covered: the impact of the past 50 years of both statewide and Newark-focused environment grantmaking; the foundation’s role in permanently protecting over 100,000 acres of open space in critical areas of New Jersey; and findings gleaned from the CREED Strategies survey to the leadership of statewide environment grantees. A special trustees’ meeting was held in February 2021 to reflect on lessons learned and consider where the foundation should land in terms of environmental grantmaking. While there was not unanimous agreement, a considerable majority of trustees believed that with limited resources and a more explicit focus on racial equity, the foundation ought to focus its efforts on environmental sustainability
and climate justice concerns in Newark, bringing in statewide advocacy and conservation groups when deemed appropriate by local stakeholders.

**Uncovering Internal Contradictions**

The foundation had its first reckoning with the internal contradictions that accompany the shift toward having an explicit racial equity and justice focus after a new compensation policy was introduced to the staff in November 2020. The policy was perceived to impact the two Black women staff members inequitably. A staff member recounted the events that unfolded with the compensation policy in this way: “In November of 2020, there was a new compensation policy that was rolled out. Some staff members benefited from this compensation policy. Some staff members did not benefit from this compensation policy. When this was discovered in December 2020, staff wrote a collective statement to leadership saying their disappointment in this policy and how it was rolled out, how it was relayed, how it didn’t match with values that we’re claiming to try to be moving towards in the strategic plan. And that was the spark that ignited staff to step back from the strategic plan because there were a lot of feelings and I think a lot of support from various members of the staff.”

While essential work was taking place to address the COVID-19 pandemic in Newark during the first quarter of 2021, as well as preparation for the trustees’ meeting focused on environmental grantmaking, the non-management staff did not participate in the staff retreats facilitated by Frontline Solutions. Irene Cooper-Basch stated that the issue was not taken lightly by management or the personnel committee: “When we got the initial letter, a group letter at the end of last year [2020], with the concerns about compensation, we took that very seriously and we started to work with Nonprofit HR. This is a nonprofit consulting firm that is really steeped in equity. It’s led by people of color and staffed by people of color.” From the non-management staff’s perspective, the decision to initially withdraw from the strategic planning retreats arose from multiple factors, including their disillusionment with what they perceived to be a defensive reaction from leadership to the questions raised by the non-management staff.

A staff member offered the following explanation for why the new compensation plan escalated internal tensions to such an acute tipping point for the staff: “I think that the challenges we’ve been having as a staff have to do with the spotlight that this strategic planning process has put on the gap between our group rhetoric and our lived reality when it comes to moving in alignment with certain values. We did not do the internal culture work in advance of the strategic planning work to arrive at a common understanding of
what we mean when we talk about a commitment to racial justice and racial equity and how we want to live those values at work.”

From January 2021 through April 2021, non-management staff did not participate in any strategic planning activities. In March, a collective decision was made to engage an external facilitator skilled in organization dynamics and racial equity to interview management and non-management separately and facilitate a conversation between the groups. This process created a pathway to begin addressing issues and concerns, helping clear the air so that the non-management staff felt comfortable reengaging in the strategic planning process.

Non-management staff actively rejoined the process in a half-day staff strategy planning retreat with Frontline in May 2021, giving additional written feedback for the final iterations of the strategic plan framework prior to the June board meeting. The finished product reflects the formative ideas and contributions that non-management staff made at the beginning of the process, as well as their feedback as the final documents were developed.

By all accounts, every member of the staff was profoundly affected by the collective experience of turning the mirror inward to examine institutionalized racism within the foundation. According to program officer Jessica Debrah, “It was a collective process in the beginning. We were all very excited about this potential change. However, as we started to unearth internal problems, it became apparent to me and some members of staff that before the organization could truthfully and authentically engage in a racial justice process for the city of Newark, we needed to begin practicing it internally and that would take more time than initially predicated; but there was no shift in the timeline to reflect the growing edges needed organizationally and culturally.” Irene Cooper-Basch, looking back at the effects of introducing a new compensation policy while deeply immersed in the work of developing a racial equity framework and her own personal role in the process, said, “Honestly, it’s been a learning journey for me personally. The way I was leading as a white woman positional leader in a traditional foundation was very far from the emerging ideals and vision and values that we’ve developed. I feel like I’ve made quite a number of shifts, but there were things that I didn’t see.”

This experience made it more apparent to the foundation that as it moved forward in its transformation process, it would need to attend carefully to internal and external dynamics and cultural shifts. As a result, and at Irene’s urging, the trustees made a rare move in the foundation world and appointed Craig to serve as co-executive officer alongside Irene in a co-leadership model. In a statement posted on Victoria’s website, the president of the Board of Trustees Frank Alvarez stated, “This co-leadership model is virtually non-existent
in the private foundation sector where 92% of leaders are white, but we believe it aligns well with our strategic planning efforts of the past year and our emerging values to center community and to shift our grantmaking towards racial, social, and economic justice. We believe the quality of decisions will improve with two strong and complementary leaders thinking through issues collectively with staff.”

Rising to the Challenge: A Racial Equity and Justice Strategic Framework

Victoria spent close to two and half years engaged in learning, self-reflection, and planning to redefine itself and design a grantmaking framework that would allow the foundation to meaningfully contribute to the racial equity goals of the residents and communities in Newark. The racial equity framework that emerged from the combined insights of trustees, staff, and stakeholders is the compass for trustees’ future grant decisions, guiding the foundation’s goals and initiatives. It is “an accountability construct, the language and commitments for which the trustees serve as stewards when deliberating and making decisions” (VF Board Meeting Minutes, February 2021). Victoria’s explicit focus on racial equity grantmaking commits the foundation to a set of newly defined vision, mission, and values statements that anchor the foundation’s work in deep partnership, collaboration, and investment in community voice and leadership:

- **Vision Statement:** Victoria Foundation envisions a thriving Newark where residents are self-determining, liberated, and connected with plentiful opportunities to advance community voices and visions.

- **Mission Statement:** Victoria Foundation partners with Black and Brown residents and other marginalized communities in Newark and non-profit organizations to champion bold strategies that strengthen community power, foster economic justice, promote youth self-determination, and respond to pressing needs.
● **Values Statements:**
  ○ Anti-Racism: We are committed to building an equity-centered culture that seeks to actively dismantle structural racism in Newark and in the field of philanthropy.
  ○ Solidarity: We use our resources and tools to work side by side with Black and Brown residents and other marginalized communities for the change they want to see.
  ○ Courage: We reimagine traditional practices in philanthropy to innovatively support local visionaries. We use our platform to advocate with Newark residents on a local, state, and national level.
  ○ Respect: We recognize the inherent worth and dignity of all individuals, both inside and outside of the Foundation.
  ○ Trust: We prioritize relationships over transactions as we work with the community, our partners, and each other. We believe in Newark residents’ ability to determine what they need to thrive, and we support them in making those visions a reality.

The following four strategic goals are outlined in the new strategic framework:

- **STRATEGIC GOAL 1: STRENGTHEN COMMUNITY POWER**
  We leverage the tools of the Foundation to support community-led organizations, coalitions, projects, and causes that use organizing, advocacy, and movement-building to create systemic change in Newark.

- **STRATEGIC GOAL 2: FOSTER ECONOMIC JUSTICE**
  We leverage the tools of the Foundation to build economic security, community wealth, and prosperity for Newark residents, particularly those most impacted by the racial wealth gap.

- **STRATEGIC GOAL 3: PROMOTE YOUTH SELF-DETERMINATION**
  We leverage the tools of the Foundation to support platforms for young people to expand their power in determining a future for themselves, their families, and their communities.

- **STRATEGIC GOAL 4: RESPOND TO PRESSING NEEDS**
  When urgency requires, we temporarily serve as a stopgap to meet community needs in Newark.
The powerful and bold ideas, values, and practices codified in Victoria’s new framework were discussed by the trustees up until the vote to approve and adopt the new framework. During the June 2021 trustee meeting, as the trustees were preparing to approve the strategic framework, another vital discussion about language took place—this time focused on the importance of naming Black and Brown residents in the mission statement. Prior to this critical trustee meeting, planning committee members called each trustee individually to see if there were any concerns that they might address before the trustees convened for the vote. These calls raised questions about calling out Black and Brown residents. In response, the planning committee amended the mission statement to read “…Black and Brown residents and other marginalized communities.” Despite these efforts, several trustees still felt that the explicit reference to Black and Brown residents in the updated draft of the mission statement was exclusionary of other groups, such as immigrants and LGBTQ communities. In response, trustee Ana Baptista emphatically stated,

“As a Portuguese immigrant who grew up in the Ironbound, with family still there, I’m part of that 8 percent of white people [previously mentioned as living in Newark]. I feel very strongly that we need to explicitly state “Black and Brown communities.” As an organization that has gone through this process of racial reckoning, what we set out to do as a board is to take stock and educate ourselves about why do we have to name and explicitly affirm Black and Brown communities. The importance of that stems from the structural racism and the legacy of institutional and structural racism that our country and our city reflect. And while being an immigrant and a poor white immigrant in this city had disadvantages and challenges, it’s not the same. It really is not the same. Learning about the history of our country and our city…and when we see the effects. We looked at the data, in terms of health, environmental, and economic disparities, that are intergenerational and entrenched in our systems. Whiteness never has to speak its name. Being white has a certain privilege. Saying “Black and Brown communities” doesn’t erase other people. It doesn’t say we don’t care about other communities. It’s like saying Black Lives Matter. We’re not saying other people’s lives don’t matter. We’re being explicit to raise the visibility and to recognize the impact racism has had on those who have not been afforded the same privileges that being white gives you.”

Ana’s comments and positioning of herself were crucial to evolving the trustees’ collective understanding of why naming Black and Brown residents is non-negotiable in a racial equity and justice framework. The trustees voted unanimously to pass the new strategic framework. Additionally, after 97 years of operation, the board voted to implement term limits for trustees (though family members would continue to be exempt). With these significant milestones underway, Victoria is now poised to situate itself within Newark and across philanthropy as a leader in racial equity and justice grantmaking. For trustees and staff alike, this is an unprecedented responsibility.
Hopes and Aspirations for the New Strategic Framework

Victoria’s new framework speaks directly to many of the hopes and aspirations that trustees, staff, and stakeholders have for what the foundation’s planning efforts would yield. Many spoke of the foundation leveraging its position as a privately endowed foundation to stand in the gap and push on issues and policies in ways that elected officials or corporate foundations may not be able to do. Mateus Baptista of the Panasonic Foundation said, “I think that of any group in the City of Newark, a privately funded, privately endowed foundation has a responsibility to stand up and take the heat because they can.” President of the Prudential Foundation Shané Harris shared a similar sentiment: “The question is what do you want to be about? Sometimes change requires difficult conversations, moving beyond the status quo, and the ability to take risks. It feels like they are willing to do that now in ways that I don’t think they have been willing to in the past.”

Co-founders of Greater Life, Inc., Reverends Maria and Michael Westbrook, indicated that they hoped the new framework would provide mechanisms that will allow them and other community-based organizations to continue to have a voice at the table “and also to work towards the solutions together as a team with others.” Kaleena Berryman, executive director of the Abbott Leadership Institute, another Victoria grantee, expressed her hope for Victoria to lead by example: “My hope right now is that they be an example for that. I hope that they become an example for what racial equity funding looks like, that they continue in this process.” Mayor Baraka stated that he hopes the foundation would emerge from their redesign process “to support systems so that they could be self-sustaining and support generations of families in these efforts.”

Trustee Robert Clark captured the aspiration that the foundation demonstrates what change looks like and holds itself accountable to that vision: “My hopes for the organization are really my hopes for Newark in that the city and its grantmakers, Victoria Foundation specifically, can be clear about what forward movement looks like. We can hold ourselves accountable to some of the decisions that we make and the commitments that we make and be brave enough to shift directions if we need to.”
Leaning in Early

The on-the-ground crises resulting from the pandemic and the racial reckoning sparked by George Floyd’s murder moved the foundation to action despite its pause in grantmaking. Trustees did not wait for the strategic framework to be finalized before leaning into investments aligned to the new strategic vision.

Between July and December, 2020, trustees approved out-of-cycle rapid response grants totaling $217,500 to seventeen organizations doing on-the-ground racial justice work, especially centered around opposing anti-Black police violence. In December 2020, the trustees approved a one-million-dollar grant providing seed funding for a guaranteed basic income pilot program launched by Mayor Baraka to address the economic insecurity faced by Newark’s residents. It is the single largest grant the foundation has awarded since establishing the School Innovation Fund to support groundbreaking practices to improve academic outcomes in 2013. Another compelling example is a $400,000 carve-out from a $1,150,000 COVID relief grant approved in March 2021—the third such round of emergency support to address food insecurity and other basic needs stemming from the pandemic in Newark. Rooted in trust-based philanthropy, the foundation granted this carve-out to a coalition of five grassroots groups in Newark that are much closer to the ground than Victoria Foundation, which are better able to address the needs of hard-to-reach populations in Newark. The groups that received the grant hold all the decision-making authority about deploying these funds.

These grants are early signals of the foundation’s commitment to step into unchartered waters to support initiatives that reimagine and rethink resources, power, and opportunity.

Lessons for the Future of the Work

Many lessons from Victoria’s nearly 100 years of grantmaking informed the development of the racial equity and justice framework it will use to chart the foundation’s work into the future. The foundation’s time learning, reflecting, and defining how it will approach its relationships, practices, and work with community-based organizations and the larger philanthropic community has also been an invaluable teaching moment. As one staff member at the foundation put it: “I think that there were so many different
avenues of learning. There was so much thinking about internal policies, how to lift employees up, and how to work together in a different way that wasn’t so hierarchical or that counted so much on the longevity of relationships. There was also thinking about the new work and what it would look like, defining equity, defining anti-racism, and figuring out, based on their 100 years of grantmaking, how to come out differently while honoring the relationships that already existed.” The new framework calls for a shift “upstream” that implies more funds for organizing, advocacy, and systems change and less for service delivery and programs. This is a very complicated and painful shift for an organization like Victoria, which functions as the largest and most loyal private funder in a relatively small, high-poverty place. There aren’t really other funders waiting in the wings to support the programs that will be impacted when Victoria moves its funds. The foundation will have to navigate this tension carefully as it implements its transition strategy and adopts the new framework.

Trustees, staff, and key stakeholders all recognize that the work is just beginning. In so doing, they shared a few very important lessons for the foundation to carry forward as it prepares to leave its planning journey behind and commence the critical work of embodying the new values in the work of the foundation. The following themes emerged from the lessons they shared:

**Becoming a philanthropic organization focused on racial equity and racial justice is an ongoing and continuous process.**

The real work for Victoria is in front of them. As they move forward, trustees and staff will have to translate their bold new strategic framework into policies, practices, relationships, and strategies as powerful as the language and ideals the framework embodies. Far more than a technical process, the change Victoria is striving to create for itself and its work is a normative process that requires deep cultural change within the organization and every individual that belongs to it. Trustees and staff must internalize the shared language they have created for this work. They must also continue to be immersed in collective and individual learning about systems of oppression, racial injustice, power, and privilege and put the knowledge they acquire to practice within the culture of the foundation and their personal lives.

Victoria must be different to do its work differently. So, while the foundation gets to the business of creating the structures and procedures that will bring their racial equity and justice grantmaking framework to life (organizational staffing, application processes, and grantmaking), they must focus as intently on aligning the internal and the external and keep the new strategic framework front and center in their practices.
Having an explicit focus on racial equity and justice means that the organization and the individuals within it will have to take risks.

Victoria has made a clear statement about what it stands for and how it intends to use its funds as a vehicle to help propel racial equity and justice in Newark going forward. It has stepped out onto the field as a leader, and now it must exert the will and the courage to lead. There is no playbook for how to do this. The foundation will have to be willing to listen to voices that it has not heard before, consider ideas and solutions that may seem foreign to them, deploy funds to organizations and areas of work others might consider radical, and use its power to influence policy and advocate for racial equity and justice when they have access that others do not. Victoria will also have to be more willing to try and fail, “fail forward,” to address resistance actively, and to continue to authentically share its experiences and lessons with partners in Newark and elsewhere. This will take vulnerability and humility.

Community is not singular or monolithic. There are communities to engage and community voices to be heard.

Through Victoria’s learning activities and strategic planning process, trustees and staff grew increasingly aware that there is no ubiquitous “community” out there. As the foundation adopts a vision of “a thriving Newark where residents are self-determining, liberated, and connected, with plentiful opportunities to advance community voices and visions,” multiple voices representing different communities will have to be integrated into the foundation’s work. To do this, the foundation will not only have to continue developing its intercultural competence, it will also have to build into its processes opportunities to increase cross-cultural understanding with the communities and leaders it engages. Building bridges within and across communities, cultural groups, and sectors will be vital to Victoria’s racial equity and justice focus.

Power must be shared, internally and externally.

Power is an inherent element of all relationships between foundations, grantees, and communities. To advance a racial equity and justice framework for its grantmaking, Victoria will have to acknowledge and actively work to redistribute and build collective power within the organization and in relationship with its grantees and the communities it serves. Prioritizing the development of relationships that are based on an explicit commitment to racial equity and justice is paramount to sharing and building power together. The stronger Victoria’s relationships are regarding a shared commitment to racial equity and justice, the more likely it is that a deep understanding of how power operates in systems of oppression will guide how the foundation uses and shares power. Relationships built on these principles will also increase the foundation’s openness to being held accountable for using its power in ways that live up to the potency of its new framework and recognizing when to course-correct because of the white-dominant culture and traditional philanthropic practices that seep into its work. Ultimately, to successfully share power, Victoria will have to remain vigilant about ensuring that grantmaking is driven by the collective vision and voices of Newark communities in all aspects of its work.
Centering Racial Equity and Justice in the Work of a Place-Based Foundation: Victoria Foundation’s Journey was written by Creed Strategies, a Newark-based consulting group. This narrative draws on interviews with VF trustees and staff, grantees, community leaders, and local foundation executives. We thank everyone who generously shared their time, experiences, insights, and perspectives with this project. We especially thank Victoria Foundation for choosing Creed to write their story.

Written by Lauren Wells, Ph.D, founder of Creed Strategies

ABOUT CREED STRATEGIES

Creed is a catalytic partner that collaborates with school districts, non-profits, government agencies, private entities, and philanthropy to examine and transform the beliefs, systems, policies, and practices that drive their organizations. Creed uses an education, social justice, and racial equity approach to development, collaboration, capacity building, and design in order to help partners situate their work in the shared aspirations and needs of the communities they serve. Specializing in education, community development, collective impact, strategic planning, evaluation, and grants, Creed works with our partners to identify and develop sustainable strategies for systemic problems. Creed Strategies brings together a diverse community of experts serving school districts, non-profits, government agencies, private entities, and philanthropy to customize support to clients. When organizations work with Creed, they can expect to challenge the status quo and collaborate with a nimble, diverse, and creative team of experts who loves and believes in the genius of the partners and communities Creed serves.