

## Annotated Guide to RE-Tool Racial Equity in the Panel Process

**Eleanor Savage with Tariana Navas-Nieves  
and Kathy Hsieh**

Consider downloading RE-Tool (<https://www.jeromefdn.org/announcing-re-tool-racial-equity-panel-process>) so you can follow along as you read this article. Many of the topics in this article refer directly to RE-Tool, including specific page references.

### Prologue: RE-Tool Origin Story

In 2015, a small group of peers in conversation about issues of equity in the grant panel selection process began discussing our panel practices. A question we asked ourselves is how many of us were trained to facilitate arts funding panels before running one. Not a single one of us answered yes. As panel moderators and administrators, we have a responsibility and an opportunity to understand our own practices and examine the nuts and bolts of how we actually operate our panels, from panel moderator training or lack thereof, to panelist training, to managing the panel room, and so on.

In fall 2017, with funding from the Doris Duke Charitable Foundation, we were able to form a racially diverse group of twelve from across the United States and Canada and to hire a project facilitator to support us in reaching our goals. We began meeting as a steering committee, remotely and in person, for conversations, racial justice trainings, and — at the heart of it — support in operationalizing equity practices in the organizations where we work. From our work together, we created RE-Tool as a collection of questions and practices for working on racial equity in the panel process.



Build Arts Space Equitably (BASE) Cohort, funded through the Seattle Office of Arts & Culture's Equitable Development Strategy, discuss strategies for implementing equity in the panel process during small group break-outs. Photo by Kathy Hsieh.

### Why Address Racial Equity in the Panel Process?

The panel process involves a system of often unquestioned activities — assumed to be inherently impartial — that directly impact funding outcomes. And valuing racial equity requires examining how our organizational practices can support equitable outcomes by assessing/addressing racial disparities and inequity. As grantmakers, to address racial equity in the panel process, we actively investigate who has access to opportunities and who does not. We need to work to design and implement systems and protocols that increase access and decrease barriers for historically underresourced groups. We must ask ourselves: Who submits applications? Whom do we award? Who is represented on the

selection panel? How do we train panel moderators, panelists, and facilitators? In what ways can we interrupt racial bias and contribute to systemic change?

By interrogating every step of the process from applicant pool, to the selection and training of panelists, to the panel experience

and outcomes, as well as our communication with grant-seeking artists and organizations, we can apply a racial equity lens to grantmaking and move from being part of the problem to being part of the solution.

### How to Use RE-Tool

Since the release of RE-Tool in September 2018, we have designed and led workshops at conferences and convenings nationwide, using exercises that we developed in our year of group experiences along with content from RE-Tool. Some of the conferences include Grantmakers in the Arts, National Association of State Arts Agencies, Alliance of Artist Communities, and Americans for the Arts. On a regional level, many of the people involved have connected with others in their

communities to share RE-Tool and show how to best use it.

Our recommendations come from a range of funding organizations, and RE-Tool is not a “one-size-fits-all” resource. Rather, it is a guide for how to bring a racial equity lens into decision-making processes. We hope that everyone will find actionable ideas and practical advice applicable to the work they do and that they will engage in a group process to discuss the ways in which they are managing panels. We found our group meetings that led to the creation of RE-Tool to be extremely valuable and encourage all involved in panel processes to convene colleagues within and outside of their organizations to discuss RE-Tool, talk through ideas and questions, share emerging practices and research, and make space for feedback and critique.

The Seattle Office of Arts & Culture, for example, has started an equity-in-the-panel-process work group among all project managers both in

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grantmaking and in public art selection, where RE-Tool is used as a springboard for discussion, which has led to more cross-team collaboration and innovation in selection processes. The grantmaking team piloted implicit bias training for all panelists, which has now inspired the public art team to add this action to their process as well.

### **RE-Tool Glossary and Resources**

RE-Tool provides multiple strategies to intervene in ways that expand and empower our collective work for racial equity. The document provides context, definitions, links to resources, guiding questions, examples, and tips for different practices people in the art and philanthropic fields are exploring.

#### **RE-TOOL DEFINITION EXERCISE**

Provide the group you are working with definitions of diversity, equity, inclusivity, racism, privilege, and so on.

Ask the following questions of each concept:

- Where do you experience or witness this in your personal and professional life?
- Where do you not?
- What makes the difference between whether you experience this or not?
- How do you feel when you experience it?

This helps move from “definitions” to lived experience to help us understand “what” we are talking about on a personal, organizational, and community level. If you have a large group, you can divide into smaller groups for discussion and then share the key takeaways. (Exercise shared by Eleanor Savage, Jerome Foundation)

To make use of RE-Tool, the working group recommends that a program or foundation begin with examining the language and terminology necessary for laying the groundwork to define common intentions and goals. Doing so will create a shared understanding among all in the organization. The following exercise offers an example of how to use the glossary (RE-Tool, 6–8) as part of bringing an equity lens into the process.

For further study, RE-Tool offers a list of links to resources including studies on understanding racial equity, undoing racism, and racial bias; assessment tools for investigating equity, diversity and inclusivity; and case studies of various journeys in this work (RE-Tool, 27–28).

### **Investigating the Panel Process**

Most of RE-Tool is composed of questions and tips from various funders and arts organizations to help advance equity in the grantmaking/panel process. The work is divided into four sections: Applicant Pool, The Selection and Training of Panelists, The Panel Experience, and Transparency in the Grantmaking Process.

We recommend that a group exploring RE-Tool focus on one section at a time. Evaluating panel practices and changing established working patterns are challenging, and it often feels overwhelming. Exploring one section at a time breaks the exploration into manageable pieces.

### RE-Tool in Action: Grantmakers in the Arts Support for Individual Artists Committee

The Grantmakers in the Arts Support for Individual Artists Committee, for example, decided to dive into each of the four sections, one at a time, during their monthly videoconference meetings. The committee co-chair presented a summary of the questions and topics of each section, starting with the Applicant Pool and followed by separate videoconference meetings to explore the Selection and Training of Panelists, the Panel Experience, and Transparency in the Grantmaking Process. The committee members shared their practices and questions related to each section. This offered an opportunity to discuss the challenges and successes of different methods, receive coaching from colleagues, and learn from others' experiences of trying various approaches.



Murals created, such as this work in progress from Ahmad aka Balance Alwazzan, following the Denver Arts & Venues' first year centering racial equity in the panel process focused on eliminating barriers of participation. Photos courtesy of Denver Arts & Venues.

### Toolkit Section: Applicant Pool

(RE-Tool, 13–15)

Within the applicant pool section, we ask ourselves:

- Who is applying?
- What are the barriers to applying for a grant?
- What do you do to ensure racial diversity of applicants?
- Do you have requirements or institutional goals around racial equity and diversity in your applicant pool?
- What are your application criteria?

### RE-Tool in Action: Cultural Affairs at Denver Arts & Venues

Tariana Navas-Nieves at Denver Arts & Venues reports on her experience with RE-Tool:

*The work done by the office of Cultural Affairs at Denver Arts & Venues (A&V), the local art agency for the City and County of Denver, provides a model for how to work with RE-Tool. For a period of one year, staff focused on the selection and training of panelists, panel structure and recruitment, and grant guidelines and applications.*

*During this first year, the office focused on eliminating barriers of participation. This began with an evaluation of the program guidelines and applications. The grant administrator and director reviewed these documents line by line and asked themselves the following questions: Why do we ask for this information? Do we need this information to make a decision? Is it difficult for an applicant to answer*

*this? Could the burden of this question be placed on us?*

*As a result of this process and feedback from applicants, requirements and questions were eliminated. For example, the requirement that an artist include a letter of support from the city council representative where their*

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*proposed mural would be located — and if the mural was in a private business, a letter of agreement from the business owner. Working with city council members is part of the regular work of a city agency, but this is not the case for artists. We made it our job, and rightly so, to inform and engage council*

members, and later facilitate an introduction between the artist and council person, which has resulted in relationship building that benefits all involved. We also created a template letter from the agency on city letterhead that artists can present to business owners. In this official letter, we explain the program, endorse the artist and present the opportunity for the owner to have a mural created in their property at no cost to them. In both of these cases, a barrier was eliminated, and the burden was passed on to us.

**RE-Tool Tip:** Track demographic information through all the stages of your application, and review process to assess for bias. For example, if your process involves five phases — application,

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prescreening, panelist review, finalist review, and awards — then accordingly assess the demographics at each phase to look for significant changes (RE-Tool, 13).

If you discover a drop in the numbers of a particular demographic group between the application and the prescreening stage, ask yourself what about the prescreening process is affecting this group of artists? If you find a significant change between the prescreening and the awards phase, what is happening in the panel review that allows a bias against a specific sector of applicants to enter the process?

### Toolkit Section: Selection and Training of Panelists

(RE-Tool, 13–15)

- Who selects the panelists?
- What criteria do you use for selecting panelists?
- Does the staff person selecting panelists and moderating the panel review receive any training?
- Do you track the demographics of your panelists? Do you have a racial diversity requirement for panels?

- What is your training process with panelists?
- Is racial equity embedded in your process and scoring system? How do you incorporate racial equity into the panel charge?
- Do you compensate panelists?
- If supporting an intermediary organization, do you have specific requirements/protocols around the panel process, and do you specifically require racial diversity on the panel?

### RE-Tool in Action: Cultural Affairs at Denver Arts & Venues

Tariana Navas-Nieves at Denver Arts & Venues reports on her experience with RE-Tool:

*In working with the RE-Tool, we wanted to begin by articulating our commitment to diversity within the selection panel. Our documents include versions of the following statement, "This panel consists of a carefully selected and diverse group of individuals who each bring a crucial perspective to the process, whether it be from the specific community in which the project takes place, art expertise, or logistical insight to help the group make the best decisions. A&V is committed to creating an inclusive and transparent selection process that reflects Denver's diversity of communities. A&V is intentional and dedicated to bringing together panels with strong participation of representatives from historically marginalized or under-resourced communities based on age, gender, gender identity, sexual orientation, race, ethnicity, and disability." We track demographics of panelists to establish a baseline. This information was extremely helpful as it informed our recruitment process, offering the opportunity to strengthen and expand our community relationships.*

### Toolkit Section: The Panel Experience

(RE-Tool, 13–15)

- How are panelists empowered to engage in equitable practices?
- Do you provide a definition of artistic merit for the panel to use? If not, do you ask panelists to define how they are determining artistic merit or quality?
- Do you discuss what biases panelists might have (that are different from conflict of interest)?

- If there is a power imbalance among panelists, do you have effective strategies for leveling the imbalance?
- How do we identify and disrupt racism when it surfaces in deliberations? How do we empower all panelists to do the same?
- What process is in place for assessing the level of fairness and equity in the panel room?

### RE-Tool in Action: Cultural Affairs at Denver Arts & Venues — Merit and Bias

Tariana Navas-Nieves at Denver Arts & Venues reports on her experience with RE-Tool:

*Bringing together a diverse group of people is only one step of many to bring equity into the panel room. Creating an inclusive and equitable space is imperative to a successful panel process. Many funders can attest to the fact that training panelists on the benefits of diverse perspectives for decision making, defining bias and discussing the impact of biases on evaluation, and exploring what are considered indicators of merit are crucial to ensure equitable funding outcomes. At A&V, we borrowed a panel guide created by the Jerome Foundation. We used it as a template and tailored it to our programs, adding a few training videos for panelists on bias. As*

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**In bringing the racial equity lens to the idea of artistic merit (intentionally not artistic excellence), we want to steer away from white cultural norms as indicators, such as the number of awards, fellowships, and residencies an artist has or critical acclaim and significant press coverage.**

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*part of the panel discussion, we also invite the panel facilitator and staff to call out their own biases, which creates an environment in which biases as well as divergent perspectives are normalized and encouraged.*

**Group Exercise: Merit/Bias:** Most arts funding opportunities include a criterion based on artistic merit. What are some of the indicators that panelists use to determine if an artist or arts organization has merit? In bringing the racial equity lens to the idea of artistic merit

(intentionally not artistic excellence), we want to steer away from white cultural norms as indicators, such as the number of awards, fellowships, and residencies an artist has or critical acclaim and significant press coverage. Many of these opportunities, especially the ones that are perceived as the most prestigious, are made by predominantly white institutions where an in-group bias may exist. (RE-Tool, 18–19)

Before beginning the panel review, have an open discussion to identify how people are understanding merit. Here is a list of ideas culled from multiple panels over the past few years:

Merit indicators for individual artists:

- Artist demonstrates strong technical skills and craft in the execution of their work.
- Self-awareness of the artist is communicated in their response to application questions.
- Work reveals something about the world, communicating unique perspective/s, inviting the viewer to question, discover, explore new ideas — the storytelling is compelling.
- Opportunity represents an artistic challenge or stretch; there is risk involved.
- Exploration feels relevant and deeply considered.
- Artist has an authentic relationship/connection to the content/community involved in the work.
- Artist shows a commitment to working in this form.
- Combination of aesthetics, technical skill, and delivery is engaging emotionally, intellectually, spiritually.

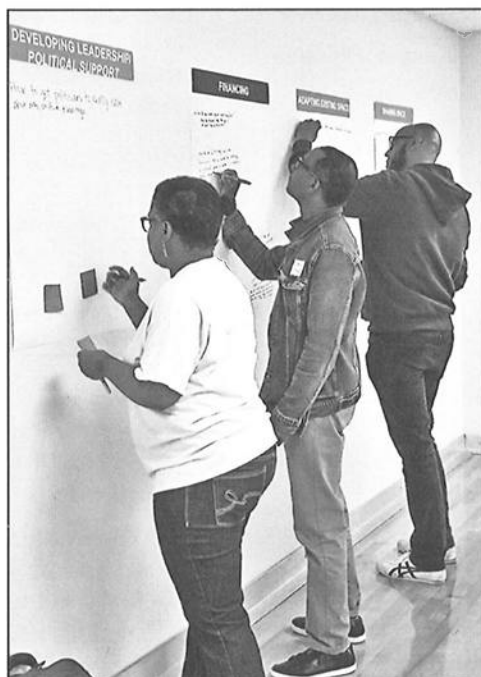
Merit indicators for organizations:

- extent to which the project serves the organization's community or constituency
- potential impact on artists (including evidence of direct payment) and the artistic field
- alignment of the project to the organization's mission, audience, community, and/or constituency
- vitality of any proposed performance measurements
- plans for documentation and distribution of project results, as appropriate

- ability to carry out the project based on such factors as the feasibility of the budget, the quality and clarity of the project goals and design, the resources involved, and the qualifications of the project's personnel
- where appropriate, potential to reach underserved populations such as those whose opportunities to experience the arts are limited
- demonstrated racial diversity on the board and among the leadership, staff, artists served, and participants in programs and audiences

In the same way that a deep understanding and delineation of merit can be integrated into the panel process, identifying bias and ways of holding one another accountable for the ways in which bias influences decisions is important to equity in panel work.

**RE-Tool Tip:** Move beyond the naming of biases as shaming or conflating bias with conflict of interest. Openly articulating filters and biases helps illuminate potential influences on decision making. Bias is natural and



Build Arts Space Equitably (BASE) Cohort participants, funded through the Seattle Office of Arts & Culture's Equitable Development Strategy, workshop strategies for implementing equity including developing leadership, financing, and adapting and sharing space, among others. Photo by Carol Rashawna Williams.

does not mean that it is automatically a bad or wrong impulse. Sometimes a conversation that arises out of a feeling of bias can provide important information for the review.

For example, a panelist might say, "This particular application is hitting on my bias against cultural appropriation." The panel facilitator might then ask how this relates (or doesn't) to the review criteria and guidelines. If the guidelines state that an artist should have an authentic relationship or connection to the content or community involved in the work, then the panelist's question has raised an important point for the full panel to consider.

### **Toolkit Section: Transparency in the Grantmaking Process**

(RE-Tool, 13–15)

- How do you communicate the program guidelines?
- Are your guidelines, review criteria, and panel process transparent to applicants?
- Do you share the panelists' names with applicants?
- Do you include the applicants in the design of program guidelines?
- Are applicants allowed to witness the panel process or be involved in the selection process?
- Do you provide feedback to applicants who are not funded?

**RE-Tool Tip:** Funders should ensure that there is a direct connection between the selection criteria and the application. For example, if artistic merit is a review criterion, let the applicants and panelists know that merit will be determined by an evaluation of work samples and the CV/ résumé. If impact is a criterion, determine the appropriate parts of the application that demonstrate it.

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**Equity is about ensuring the communities most affected by injustice get the most money to lead in the fight to address that injustice, and if that means we break the rules to make that happen, then that's what we do.**

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is only a problem in the decision-making process when it is acted on without question.

**RE-Tool Tip:** Encourage discussions of bias as a way of surfacing ideas that are guiding a panelist's scoring. Just because a bias is articulated

## **Intervention Story: Seattle Office of Arts & Culture**

RE-Tool includes an intervention story that summarizes the Seattle Office of Arts & Culture's effort to advance racial equity in grantmaking by flipping the paradigm of traditional funding models and centering the value and expertise of communities of color within grantmaking. In the words of Kathy Hsieh, Cultural Partnerships and Grants Manager: "Equity is about ensuring the communities most affected by injustice get the most money to lead in the fight to address that injustice, and if that means we break the rules to make that happen, then that's what we do."

To create more racial equity in grantmaking, the Seattle Office of Arts & Culture piloted a funding model inspired by what they had heard from nonprofit leaders of color. They recognized that ideally one's staff should reflect the diversity

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of its community, but if it doesn't, then people (artists, arts leaders, and community connectors) representing the communities most impacted by structural inequities should be brought in as consultants or paid advisors to help develop the guidelines, application, and selection process. Themes that emerged and lessons learned included the following:

### **1. Keep those who are most impacted involved throughout the process.**

The Seattle Office of Arts & Culture selected thought leaders representing the diverse communities they wanted to invest in to help brainstorm and develop the program and strategy, its goals and core values, as well as the criteria for selection and the selection process. These thought leaders also served as advisors through the entire program, including helping to evaluate what worked and what needed to evolve.

### **2. Create solidarity, not competition.**

Recognizing that structural racism is designed to pit those without institutionally backed power against each other, the office asked how they could offset this in the grantmaking practice. Instead of having organizations apply for funding, the office did the rigorous and intensive research to find the awardees that best fit the criteria they were seeking. Many funders feel this limits opportunity, but if you truly know your community and have spent time getting to know them, and especially if the staff or advisors doing the selection reflect the diverse community you are trying to fund, this strategy supports the community by not wasting their capacity to make you feel like you are creating opportunities when you are actually only creating competition.

### **3. Fund significantly more than what you are asking for in return.**

Often arts funding only covers the direct expenses of a project with a small percentage for overhead. But if we are trying to make up for historic inequities, especially when funding artist of color organizations, how can equity ever be achieved if they are always playing catch-up? For the thought leaders who worked with the Seattle Office of Arts & Culture for almost two years to develop and implement the program, an equivalent of \$1,000/hour was invested in the organizations these thought leaders represented.

### **4. The funding should help the organization achieve its own mission.**

The organizations were selected primarily because the work and mission of each of them aligned completely with what the Seattle Office of Arts & Culture was seeking their expertise for, and they had demonstrated themselves as key connectors in their communities. Their time with the office was designed to leverage their experience and knowledge of their communities to help the office identify the strategy that they felt would serve their communities best, which was the office's goal as well.

### **5. Funding should not be restrictive.**

The recipients could use the funds for anything they wanted — to cover overhead, to carry out a project, to regrant, anything. If you trust that all of the organizations you are invested in will do good, valuable, meaningful work, then you

should trust that they are using the funds in ways that advance their mission.

## 6. Create transformational value.

Most funding in this country is transactional. How can we make our funding investments transformational? The Seattle Office of Arts & Culture's equitable development model not only provided direct funding, it also resulted in

- leadership development,
- collective organizing,
- an asset-centered framework, and
- community connections.

## The Value of a Tool: Closing Thoughts

During RE-Tool development time, our group recognized that tools are necessary to dismantle deep-rooted structures and to rebuild processes that have equity as their foundation. Our *goal* in creating RE-Tool was to share a practical guide that would support our colleagues in changing established processes from the inside out and lead to major systemic changes in grantmaking. Our *hope* is that RE-Tool continues to be shared and that it inspires further strategies to elevate racial equity as paramount to our work.

*Eleanor Savage is program director of the Jerome Foundation, focusing much of her work in the field of arts philanthropy as an advocate for racial equity and undoing racism. She is one of the founding members of the Racial Equity Funder Collaborative, a Minnesota-based learning and action cohort focused on furthering equity and justice in philanthropy. Savage is on the board of directors for Grantmakers in the Arts and a co-chair for GIA's Support for Individual Artists Committee.*

*Tariana Navas-Nieves, director of cultural affairs for Denver Arts & Venues (A&V), City and County of Denver, has twenty-five years of experience in equity and race and social justice work, museum and curatorial practice, grantmaking, translation and interpretation, television, and communications. She developed and leads the Equity, Diversity and Inclusion Initiative for the agency and is the co-lead on the mayor's citywide Race and Social Justice Initiative.*

*Kathy Hsieh is the cultural partnerships and grants manager for the Seattle Office of Arts & Culture. A change agent in transforming the office's community engagement and arts funding practices through a racial equity lens, she helped the agency earn the Seattle Management Association's first Race and Social Justice Management Award.*

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### NOTE

RE-Tool: Racial Equity in the Panel Process can be downloaded at <https://www.jeromefdn.org/announcing-re-tool-racial-equity-panel-process>.

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