



The WES Mariam Assefa Fund is deeply committed to dismantling racism, discrimination, and biases to improve economic mobility and inclusion for all. In 2021, we launched several data collection efforts and adjusted our funding application to better center equity in who and how we fund.

First, the WES Mariam Assefa Fund seeks to better understand the diversity of the organizations it supports. A core goal of the Fund is to support proximate leaders – leaders who come from the communities they serve and have direct experience or knowledge of the issues they seek to address – and organizations led and staffed by people with lived experience from the immigrant, refugee, and BIPOC communities they serve. Better understanding the diversity of the organizations who apply for and receive funding from the Fund will enable us to better understand who we are – and aren't – funding, identify inequities in how we support different communities, and set goals to increase funding for proximate leaders and organizations.

To that end, we invite funding applicants to provide information about the identities of their leadership and staff, as well as an opportunity to list the aspects of their identities that they feel are most important to them.

Providing this information is entirely voluntary. We understand that our applicants and grantee and investee partners are on their own journeys as well, and that not everyone will want or be able to provide this information. **No information that funding applicants provide (or choose not to provide) will be used to treat them in any adverse manner.** We will not share individual organization information externally. Data provided on this form will be aggregated and used to develop portfolio-level metrics for internal and external reporting, communications, and goal setting.

Second, through our funding application, we seek to understand the communities and people that benefit from an applicant's work, as well as how applicants center the perspectives, experiences, and voices of workers and communities in their efforts. Two of the Fund's goals are to catalyze solutions that advance equitable economic mobility and to accelerate the uptake of worker-centered innovations. As such, it is essential for us to consider how applicants center equity in their organization and in the design, implementation, and assessment of the initiatives they lead. Below you can find examples of questions related to an organization's diversity, equity, and inclusion priorities, the



communities it serves, how it centers workers and communities, and its approach to impact that we have included in recent funding applications.

As a young philanthropic funder launched in 2019, we are still creating our processes and practices, and seek to continuously improve. Determining how we can best center equity in who and how we fund is a work in progress and will evolve over time.

Collecting demographic information and insights on applicants' approaches to equity is also just one part in our strategy to center equity in our practices. For more information on the Fund's commitments and priorities related to equity, inclusion, diversity, and racial justice, please refer to our **Equity, Diversity, & Inclusion Statement**.

Optional Demographic Information Questions for Funding Applicants

These are the voluntary demographic questions that we currently include in our funding applications to better understand the diversity of the organizations who apply for and receive funding.

Please share with us some information about your organization's leadership and staff. We have listed some demographic identities for your use in telling us about how your executive team, board of directors / advisory board, and staff identify. If you prefer to share qualitative insights, we also invite you to tell us about the ways in which members of your organization self-identify in the narrative questions in each section.

1) Executive Team:

Please describe the organizational structure of your executive/leadership team.

Provide the total number of Executive Team Members, then fill in how many executives identify with each demographic identity.

Total Number of Executive Team Members: _____

Race & Ethnicity Identities: How many of your executive team members publicly self-identify as (select all that apply for each team member, using numbers to indicate how many executives identify in each category):

For U.S. Applicants:

☐ Asian/Asian Americans _____

- ☐ Black/African American/African _____
- ☐ Hispanic/Latino/Latina/Latinx _____
- ☐ Native American or Alaska Native, and who maintains tribal affiliation or community attachment _____
- ☐ Native Hawaiian or Other Pacific Islanders _____
- ☐ White/Caucasian _____
- ☐ Prefer Not to Answer _____
- ☐ Prefer to Self-Describe (field provided below) _____

For Canada Applicants:

- ☐ Aboriginal (Inuit, Métis, North American Indian) _____
- ☐ Arab/West Asian (e.g., Armenian, Egyptian, Iranian, Lebanese, Moroccan) _____
- ☐ Black (e.g., African, Haitian, Jamaican, Somali) _____
- ☐ Chinese _____
- ☐ Filipino _____
- ☐ Japanese _____
- ☐ Korean _____
- ☐ Latin American _____
- ☐ South Asian _____
- ☐ South East Asian _____
- ☐ White (Caucasian) _____
- ☐ Prefer Not to Answer _____
- ☐ Prefer to Self-Describe (field provided below) _____

If you chose "Prefer to Self-Describe", please use this field to do so.

Immigrant and Refugee Identity: Are any executives on your team a first or second generation immigrant to the United States? The first generation refers to those who are born internationally. The second generation refers to those with at least one parent born internationally. (Select all that apply for each team member, using numbers to indicate how many executives identify in each category):

- ☐ First Generation _____
- ☐ Second Generation _____
- ☐ Other relevant lived experience with immigration or forced migration _____
- ☐ No _____
- ☐ Prefer Not to Answer _____
- ☐ Prefer to Self-Describe (field provided below) _____

If you chose "Prefer to Self-Describe", please use this field to do so.

Gender: How many of your executive team members publicly self-identify as (select all that apply for each team member, using numbers to indicate how many executives identify in each category):

- ☐ Female _____
- ☐ Male _____
- ☐ Non-binary _____
- ☐ Prefer Not to Answer _____
- ☐ Prefer to Self-Describe (field provided below) _____

If you chose 'Prefer to Self-Describe', please use this field to do so.

Transgender/Cisgender: How many of your executive team members publicly self-identify as (select all that apply for each team member, using numbers to indicate how many executives identify in each category):

- ☐ Transgender (gender assigned at birth was not consistent with my gender identity) _____
- ☐ Cisgender (gender assigned at birth was consistent with my gender identity) _____
- ☐ Prefer Not to Answer _____
- ☐ Prefer to Self-Describe (field provided below) _____

If you chose 'Prefer to Self-Describe', please use this field to do so.

If you prefer to share qualitative insights into your executive's background and personal alignment with the issue areas, please feel free to do so here. For example, are there other forms of identity that are most relevant and important for us to know? Do any members of your executive team share the same background, belong to the communities you serve, or have significant experience with the issues you seek to solve? (suggested word count: up to 200 words)

2) Board of Directors / Advisory Board:

Start with providing the total number of board of directors / advisory board members, then fill in how many board members identify with each demographic identity.

Total Number on Board of Directors / Advisory Board: _____

Race & Ethnicity Identities: How many of your board of directors/ advisory board publicly self-identify as (select all that apply for each board member, using numbers to indicate how many board members identify in each category):

For U.S. Applicants:

- ☐ Asian/Asian Americans _____
- ☐ Black/African American/African _____
- ☐ Hispanic/Latino/Latina/Latinx _____
- ☐ Native American or Alaska Native, and who maintains tribal affiliation or community attachment _____
- ☐ Native Hawaiian or Other Pacific Islanders _____
- ☐ White/Caucasian _____
- ☐ Prefer Not to Answer _____
- ☐ Prefer to Self-Describe (field provided below) _____

For Canada Applicants:

- ☐ Aboriginal (Inuit, Métis, North American Indian) _____
- ☐ Arab/West Asian (e.g., Armenian, Egyptian, Iranian, Lebanese, Moroccan) _____
- ☐ Black (e.g., African, Haitian, Jamaican, Somali) _____
- ☐ Chinese _____
- ☐ Filipino _____
- ☐ Japanese _____
- ☐ Korean _____
- ☐ Latin American _____
- ☐ South Asian _____
- ☐ South East Asian _____
- ☐ White (Caucasian) _____
- ☐ Prefer Not to Answer _____
- Prefer to Self-Describe (field provided below) _____

If any of your board members chose to self-describe, please use this field to do so.

Immigrant and Refugee Identity: How many of your board of directors / advisory board are first or second generation immigrants to the United States? The first generation refers to those who are born internationally. The second generation refers to those with at least one parent born internationally.

- ☐ First Generation _____
- ☐ Second Generation _____
- ☐ Other relevant lived experience with immigration or forced migration _____
- ☐ No _____



- ☐ Prefer Not to Answer _____
- ☐ Prefer to Self-Describe (field provided below) _____

If any of your board members chose to self-describe, please use this field to do so.

Gender: How many of your board of directors / advisory board publicly self-identify as (select all that apply for each board member, using numbers to indicate how many board members identify in each category):

- ☐ Female _____
- ☐ Male _____
- ☐ Non-binary _____
- ☐ Prefer Not to Answer _____
- ☐ Prefer to Self-Describe (field provided below) _____

If any of your board members chose to self-describe, please use this field to do so.

Transgender/Cisgender: How many of your board members publicly self-identify as (select all that apply for each board member, using numbers to indicate how many board members identify in each category):

- ☐ Transgender (gender assigned at birth was not consistent with my gender identity) _____
- ☐ Cisgender (gender assigned at birth was consistent with my gender identity) _____
- ☐ Prefer Not to Answer _____
- ☐ Prefer to Self-Describe (field provided below) _____

If any of your board members chose to self-describe, please use this field to do so.

If you prefer to share qualitative insights into your Board of Directors' / Advisory Board's background and personal alignment with the issue areas, please feel free to do so here. For example, are there other forms of identity that are most relevant and important for us to know? Do any members of your Board of Directors / Advisory Board share the same background, belong to the communities you serve, or have significant experience with the issues you seek to solve? (suggested word count: up to 200 words)

3) Staff:

Please share any qualitative insights into your staff members' background and personal alignment with the issue areas. For example, are there forms of identity that are most relevant and important for us to know? Do any members of your staff, in particular program / project team members, share the same background, belong to the communities you serve, or have significant experience with the issues you seek to solve? (suggested word count: up to 200 words)

Sample Questions Related to Applicant's Approach to Equity and Impact

These are the questions we currently include in our funding applications to better understand the communities and people that benefit from an applicant's work, as well as how applicants center the perspectives, experiences, and voices of workers and communities in their efforts.

Organization:

The WES Mariam Assefa Fund has made an explicit commitment to equity and inclusion [link to statement will be here]. Please briefly describe how your organization advances equity and inclusion. For example, does your organization have any diversity, equity, inclusion, and/or racial justice goals, priorities, initiatives, and policies? (suggested word count: up to 150 words)

Communities Served:

Please take a moment to tell us more about the communities and people that benefit from your work, such as information about race and ethnicity identities, gender identity, or socioeconomic status. If you are requesting funds for a specific initiative, please provide data on the people you expect to serve with that initiative. Otherwise, please provide data on the people your organization serves in a year. Please share estimated percentages of the total number of people who will benefit or be served, if available, and/or a qualitative description. (suggested word count: up to 250 words)

Approach to Impact:

How are you planning to engage the communities served, such as program participants, employees, or students, in shaping this initiative? (suggested word count: up to 150 words)

How do you center the agency and perspectives of the communities served, such as workers, program participants, employees, or students, in your programs and solutions? (suggested word count: up to 200 words)

How do you build relationships with the communities and people you serve? (suggested word count: up to 150 words)