INVESTING IN INDIAN COUNTRY
Bush Foundation Evaluates Its Data

Any analysis of philanthropic funding is only as good as the coding and data behind it. But ask any program officer about their methodology, and their answers will likely be different.

"What we found when we actually dug into our data is that the numbers don't always reflect reality—and it's not necessarily intentional," says Carly Bad Heart Bull, Native nations activities manager at the Bush Foundation. "For example, say we fund a school that checks all the boxes indicating that they serve every population group, but the school only has one or two Native students. Is this really an investment in Indian Country?"

Discrepancies like this are not new. Analyzing grants that can be identified as designated to benefit a specific community like Native Americans, either based on the grant description or the recipient organization's mission, is seldom straightforward. Even for the Bush Foundation, which has a strategic focus on Native communities, it can be challenging to unpack which of its own grants serve Native Americans.

Attendees at a Bush Foundation event discuss the role of arts in culture in community problem solving.

UNDERSTANDING THE PROBLEM

The Bush Foundation serves Minnesota, South Dakota, North Dakota, and the 23 Native nations that share the same geography. The foundation has a specific Native Nation Building strategic initiative, but their commitment to Indian Country extends beyond this one program area to essentially all their work. In 2017, the foundation decided to review and learn from their Native-focused work across all their program areas in order to better support Native communities moving forward.

Bad Heart Bull and Erica Orton, the foundation's learning & evaluation manager, were tasked with the strategic priority to demonstrate the foundation's commitment to Indian Country and to develop a report to make their investments in Native communities more transparent. To get there, they knew they'd have to go through an intensive process of re-examining their data to conduct a more accurate, thorough assessment of their funding. Bad Heart Bull and Orton began looking back—way back—at decades of grant memos, applications, and reports.

"We did not realize how big a lift it would be," explained Bad Heart Bull. "Early on, we discovered there were many inconsistencies in how data had been collected and coded. In order to paint a clear picture of our funding over time, we had to understand how the work had been coded over time."

With data going back as far as 1970, their research led them to the Minnesota Historical Society, which archives the foundation's historical records. With the help of the society, they pulled boxes and found financial records, but in many cases, it was unclear if grants were serving the Native community. Orton had to cross-check records with hand-written notes and typed correspondences to determine if funding was truly serving Indian Country.

Even with more recent digitized data, they had a lot of information to clean through. Although they could divide the data by categories like geographic area served, racial/ethnic group served, and program area, some of these fields and the options within them changed over time, as did the way program officers interpreted the fields.

Looking to the past was an important step for the Bush Foundation to establish an understanding of how to move forward, smarter. "We went in knowing the older data might not be as clean, but we found that even in recent years there were inconsistencies stemming from differences in understanding and interpreting codes or due to staff turnover. While we expected to see issues historically, it also brought up a lot of insights about our current coding," shared Orton.

DEFINING INTENTIONALITY

Looking at all the years of data together, Bad Heart Bull and Orton had to make a lot of judgment calls regarding intentional giving. They decided they would not just accept how something had been coded but would instead gather as much information as possible to decide if a grant was serving Native communities. They checked the coding against grant reports and grant proposals and decided that where it just wasn't clear, or if there was not enough information, they would elect not to count the grant as explicit funding for Indian Country.

With the example of the school that marked that they served all populations, the Bush Foundation decided this information alone was not enough to code an organization as serving Native communities or people. Without more information to show such intentionality, they excluded those grants from their report.

When the information was ambiguous, the Bush Foundation decided this likely meant that there wasn't an intentionality around serving Native people. On the other hand, it was very clear when grants did focus on Native communities. As a result of making decisions like this, the Bush Foundation realized the pool of funding could end up being smaller than they previously assumed. However, it was well-understood within the foundation that the purpose of the report was to paint the most accurate picture of funding that was possible. They also knew they could explain that funding amounts may not be exact because of historical record keeping and human error.

Another consideration was how the information would be interpreted once publicly reported. "If a community sees from our report that a large amount of funding was directed toward them, but they haven't actually felt that funding, it could damage our relationship with them," said Bad Heart Bull. Ultimately decided that they "wanted to avoid 'padding' the numbers in any way."

A specific Native program is not always necessary in order to intentionally serve Native communities.

–Carly Bad Heart Bull

Having given structure and methodology to cleaning and assessing the data, the Bush Foundation published its findings in the 2018 report, _Native Nations Investments_. Data was gathered from the Bush Foundation's internal database: grant data available since 1970, and grant payments and amounts available since 1982. Then, grants were categorized by current program areas since 2012.

What they found was that intentional investment for Native peoples existed across most program areas. For some programs, Native funding fluctuated or decreased, while in others funding went up over the years. They were interested in learning how much money was going toward Indian Country, both within and outside of their Native Nation Building initiative which had begun in 2010. "By cleaning the data, we knew that some of the figures would be smaller than what had been reported. Still, we were glad to see significant investments happening across program areas, as well as areas note where we could improve."

"This proved to us that a specific Native program is not always necessary in order to intentionally serve Native communities. We hear funders say they wish they had a specific program for Native peoples—but you can be intentional in targeting Native communities within any number of existing program areas like education, environment, or health," said Bad Heart Bull.

IMPROVING PRACTICE

Looking back at data from the 1970s, the foundation was able to learn a lot about its history that stretched beyond their work in Indian Country. They learned about their data, recording processes, and priorities that had shifted as the foundation changed over the years. As the Bush Foundation continues to evolve, they are using the findings from this research to improve how they track demographic information (for all groups) and the processes by which they code grants moving forward.

Members of the Bush Foundation's 2017 Native Education Advisory Group discuss the landscape of Native education and promising strategies moving forward in the region.

"We've changed how we train staff in determining whether a grant is serving Indian Country," said Bad Heart Bull. The Foundation initiated annual coding trainings in 2017 and has since incorporated a lens specific to coding for Native communities.

Their first step was to develop a document that clearly defined terminology, and then to walk program officers through examples of how to code grants. After the initial training, they found that, overall, the foundation staff did a much better job of identifying funding, but creating definitions also opened new questions—not just about improving coding but also how to establish a deeper understanding of the programs. "By doing this we've figured out where we need to tighten up our codes in different areas. We are continuing to iterate and improve. We need to keep asking ourselves, 'If we aren't sure about this coding, why is that? How do we need to change the language to make sure we're all coding things the same way?' We need to keep going back, encouraging staff to ask questions when they aren't sure, and reviewing our work," said Orton.

The Bush Foundation is unique in that it does not require tribes to self-identify as existing within U.S. states. For example, even if a tribe is located within South Dakota's borders, they do not have to select South Dakota as the geographic area they serve. This can lead to inconsistencies and potential data gaps when pulling data for South Dakota. While the data can still be pulled by state, staff must be intentional about including the codes for each individual Nation located within the geographic area, rather than solely relying on state codes. The foundation is still iterating on their processes to allow nuance in how grantees identify within socially-constructed borders.

"A lot of the nuance has to do with staff not coming from Native communities themselves and not understanding what it means to live on a reservation, live around a reservation, have tribal membership, or live in an urban area as a Native person. These experiences are felt so uniquely," elaborates Bad Heart Bull. "How people consider the place they live, whether by zip code, native nation, city, neighborhood, or state, shows the diversity and complexity of identity and the world we live in. The reality is it is not easy or simple, but we can start by educating ourselves about the complexity."

Bad Heart Bull, a proud member of the Flandreau Santee Sioux Tribe in South Dakota, notes that this work does not have to be done by Native people alone. Native people will understand nuances that others may not, but the work can still happen by non-Native people who are willing to ask questions and take the initiative to be better informed about the communities they work with. "The better informed you can be about that community, the better data you're going to get," said Bad Heart Bull.

The most helpful thing in this process has been creating a culture within the foundation where staff are able to express that they don't know how to code something and are willing to have a conversation about it.

"An unexpected benefit of this has been internal education around Native communities and what it means to serve Native communities," shares Orton. "There is humility involved and we are able to talk about where we make mistakes."

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–Erica Orton

MOVING FORWARD

The Bush Foundation plans to produce a second report in 2020. Building from the initial report, which was in part a historical analysis, they are determining how a regularly updated reporting process might help them continue to better serve Native communities. "We've come a long way, but we recognize that we'll need to keep revisiting this topic, engaging in conversation, and that is okay," says Bad Heart Bull.

They are focusing on moving forward with continued intentionality. "A real breakthrough for us as a foundation was understanding the intentionality behind our funding and accepting that it is not wrong to say something is or isn't serving Native people depending on whether the work is truly trying to effect change within a specific population," says Orton. The Bush Foundation now uses a similar test about intentionality when it comes to grants and work serving people of color. For example, if someone says they're serving the Latinx community, they take similar steps to ensure support is meaningfully directed for that community.

The Native Nations Investments report helped to highlight how other communities can also benefit from this type of analysis. "We're going to continue to think about this for other population groups, including non-racial categories like gender identity, veterans, people with disabilities, and the people experiencing homelessness," continued Orton.

The Bush Foundation hopes this work encourages other practitioners to engage in a culture of intentionality with data. Not everyone needs to conduct a historical analysis. A starting place for any organization could be to "look at how you collect your data moving forward and how that can make a difference. Have conversations with staff and grantees about definitions and be open to flexibility," recommends Bad Heart Bull.

DISCUSSION QUESTIONS

- What from the Bush Foundation's story resonates with what we have learned from our analysis of grantee data? What is something we might consider doing differently based on this approach?

- How do we share our narrative about giving and how might this impact the communities we work with? What are the ways we can support greater alignment in data collection and sharing across the field?

- How is our funding strategy informed by our data collection? What are the barriers to engaging in consistent data collection and analysis and how might we address them?

- How do we ensure that there is a common understanding of what terms mean in our data collection efforts? How adequate are our definitions, trainings, and support?

- How can our organization engage in cross-cultural learning? How can that impact our organization's methods of coding and analyzing data?

- Is our foundation keeping track of how much of our grantmaking dollars are going into Native communities? If not, why not? If so, how?