



COUNCIL *on* FOUNDATIONS

TEN WAYS FOR

Community Foundations to Consider

Diversity and Inclusive Practices

Effectiveness and Impact

Recruitment
Culture and Climate

Mission and Values

Who We Are

The Council on Foundations is a national nonprofit association of approximately 2,000 grantmaking foundations and corporations. As a leader in philanthropy, we strive to increase the effectiveness, stewardship, and accountability of our sector while providing our members with the services and support they need for success.

Our Mission

The mission of the Council on Foundations is: *to provide the opportunity, leadership, and tools needed by philanthropic organizations to expand, enhance, and sustain their ability to advance the common good.*

Statement of Inclusiveness

The Council on Foundations was formed to promote responsible and effective philanthropy. The mission requires a commitment to inclusiveness as a fundamental operating principle. It also calls for an active and ongoing process that affirms human diversity in its many forms, encompassing but not limited to: ethnicity, race, gender, sexual orientation and identification, age, economic circumstance, class, disability, geography, and philosophy. We seek diversity to ensure that a range of perspectives, opinions, and experiences are recognized and acted upon in achieving the Council's mission. The Council also asks members to make a similar commitment to inclusiveness to better enhance their abilities to contribute to the common good of our changing society. As the national voice of philanthropy, the Council is committed to promoting diversity. We are equally committed to including a wide range of perspectives, opinions, and experiences as we work to achieve our mission. Similarly, we ask Council members to commit to diversity and inclusiveness to enhance their own work. To that end, we provide them with the tools, educational programs, and opportunities they require to more effectively serve the common good.



COUNCIL *on* FOUNDATIONS

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Introduction: How to Use this Guide

This guide is designed to help foundations consider how more diverse and inclusive practices might advance their mission by making their work more effective and more reflective of communities served. By highlighting 10 ways community foundations can approach diversity, this guide seeks to spark ideas and launch further dialogue.

Your foundation can tackle any one of the 10 approaches individually to jump-start an exploration of diversity and inclusion—or work through each of the 10 one-by-one. You might choose to start on the inside (e.g., with your mission, governance, contracting, and staffing) and work your way out (e.g., with your external relations and impact). There is no one *right* way. The key is to get started.

We have purposely kept this guide brief and straightforward.

We hope it prompts honest reflection and thoughtful inquiry and puts you on a path toward a deeper exploration of how diversity and inclusive practices can unleash creative forces benefiting your grantees and community. To aid your progress down this path, see “Get to Know” on page 23 for information on institutions committed to inclusive practices; this information will be updated online.

Defining Terms: What We Mean by ‘Diversity and Inclusive Practices’

The Council on Foundations considers the term “diversity” to encompass the breadth and depth of human difference. This includes but is not limited to differences of ethnicity, race, gender, sexual orientation and identification, age, class, economic circumstance, religion, ability, geography, and philosophy among other forms of human expression. Achieving diversity does not consist merely of documenting representation via head counts and checklists but rather entails ensuring *inclusion in decision making*. As a growing body of literature argues, inclusion in decision making leads to enhanced creativity, a broader range of options, and increased effectiveness.

Diversity and inclusive practices in philanthropy: a focus on decision makers

The face and composition of the philanthropic sector is changing. Foundation staffs, boards, and other leader groups include an increasing number of women; people of color; individuals from lesbian, gay, bisexual and transgendered communities; individuals with different physical abilities; and people representing different classes and backgrounds. While foundation staffs have attracted individuals from diverse backgrounds, foundation decision makers—CEOs, trustees, advisory committee members, and other volunteers—include fewer individuals from diverse backgrounds than foundation staffs. While increased diversification of foundation staff is important and has received attention in the field, more efforts are being made to increase and diversify the pipeline to *leadership*.

Of late, the link between inclusive practices and foundation effectiveness has attracted study and discussion. Philanthropic leaders are considering the qualitative difference that a more diverse and inclusive field might make. Some leaders argue that it is critical to measure the impact or quality, rather than quantity, of representation in the sector and of grantmaking in diverse communities. Including

and beyond representation, the field is delving into how diversity and inclusive practices can help foundations achieve greater impact.

Diversity and inclusive practices in philanthropy are being reconceived more broadly as a set of activities meant to contribute to a foundation's overall mission and effectiveness. This mind-set can be particularly relevant to community foundations with few or no staff members or with limited flexibility to change board structure, funding focus, or asset mix due to the structural complexities of donor restricted endowments—trust instruments managed by financial institutions, etc. Donor intent, mission, and strategy are equally important factors and often influence the way diversity and inclusive practices are considered by different foundations.

Ten Ways for Community Foundations to Consider Diversity and Inclusive Practices

1. Consider how diversity and inclusive practices relate to your community foundation’s mission and values and the region and populations the foundation serves.

There’s an embedding process that needs to happen. This work is not optional—it’s essential, like having a good accounting system. Diversity and equity need to figure into lots of process and procedural tasks and decisions. It’s not just about values conversations and statements. It’s about how we do things daily.

*—Diane Sanchez, program officer, East Bay Community Foundation, from *Leading by Example: Diversity, Inclusion, and Equity in Community Foundations: Executive Summary*, the Coalition of Community Foundations for Youth and California Tomorrow, October 2003*

Communities can change quickly and dramatically, especially as economies shift, populations age, and new immigrants put down roots. As the U.S. Census reports, [so-called] “Minorities, now roughly one-third of the U.S. population, are expected to become the majority in 2042, with the nation projected to be 54 percent minority [emerging majority] in 2050. By 2023, [so-called] minorities will comprise more than half of all children.” [<http://www.census.gov/Press-Release/www/releases/archives/population/012496.html>] Such dramatic shifts pose a challenge for community foundation governing bodies, which must ensure “that the

community foundation reflects and serves the breadth and diversity of the community,” according to Standard II.E8 of the National Standards for U.S. Community Foundations [http://www.cfstandards.org/About_Us/all_NS.asp]. Furthermore, achieving compliance with this standard is not an end in itself. The process of working toward compliance fosters a deeper understanding of the foundation’s area in all its diversity, a knowledge that is among the highest priorities and most valuable assets of most community foundations. In short, inclusive values and mission statements help community foundations reinforce their commitment to engage the community. This ongoing, organic process toward a deeper understanding can begin quite simply, with thoughtful, informed discussions among board and staff members and community leaders.

Key questions to consider:

- ▶▶ What do diversity and inclusive practices mean to your foundation and the communities it serves?
- ▶▶ What are the current and anticipated demographic and socioeconomic characteristics of your area’s population?
- ▶▶ How might diversity and inclusive practices advance your foundation’s mission?
- ▶▶ Are the values expressed in your foundation’s mission shared and embraced throughout the organization?
- ▶▶ Does your foundation’s mission represent and engage the diversity of your area?

2. Determine whether your board membership, volunteers, advisory committees, and governance offer opportunities to enhance the foundation's diversity and inclusiveness.

The benefits of a diverse board are broad and deep. Not only do all donors appreciate our ability to represent their philanthropic interests, but also our board members of color, for instance, have given many millions of dollars to BCF and its grantees, inspiring donors from all backgrounds to join them. (BCF manages many millions of dollars on behalf of donors of color). We would not have attracted those dollars if we didn't have the rich diversity that's reflected on our board. BCF is a place where Jews, Christians, blacks, whites, men, women, gay, straight, asians, latinos, young, and old can meet to build dreams and raise the resources for a healthy future. ... Traditionally, the philanthropic community was made up of two kinds of people: individuals who had amassed great wealth and those who represented individuals who had great wealth. In both cases, the field was dominated by white males. That's changed—as it should—to reflect the evolving nature of our cities and communities.

—Thomas E. Wilcox, president and CE, Baltimore Community Foundation from Mission or Board Focused? Thought>Action>Impact: The Council on Foundations E-Journal of Philanthropic Ideas

A diverse board does not guarantee a diverse and inclusive organization, but it is certainly an important step in that direction. It signals that the community foundation sees and engages different voices in positions of authority. Exploring the diverse experiences and perspectives contributed by each board member can

help avoid burdening any one member with the job of serving as the “voice” of diversity in all the foundation’s activities.

As community foundations look for opportunities to assemble a diverse board, expectations can be quite high. Community foundations, by definition, focus on specific communities and are governed by reflective representative boards. The process of actually assembling a board reflective of the entire community, and practicing inclusive governance, can be challenging. Inclusive community foundations are always looking at less visible and evolving population groups for signs of new leaders and potential board members. This investment of time in relationship-building beyond the “usual suspects” often leads to more responsive, proactive grantmaking and development opportunities. Foundation leaders might also consider establishing grantmaking advisory committees or invite individuals with specialized skills to participate in the grant review process. Whatever path your foundation chooses, clarify how decision making and governance will be delegated, divided, or shared to ensure that your board and advisors know and appreciate their roles.

Key questions to consider:

- ▶▶ What are the current and anticipated demographic and socioeconomic characteristics of your area’s population?
- ▶▶ Is your foundation’s board reflective and representative of the communities the foundation serves?
- ▶▶ How might the foundation’s board appointment process identify a more diverse candidate pool for board service?
- ▶▶ How might governance of the foundation (i.e., strategic decision making, hiring and evaluating of executive staff, committee and investment strategies) incorporate diversity and inclusive practices?

3. Cultivate an internal culture, policies, and procedures that reflect your foundation's commitment to diversity and inclusive practices.

As we have come to define it, diversity in the nonprofit sector is the extent to which an organization has diverse people involved as board members, staff members, and volunteers. Diversity is only one aspect of being inclusive. Inclusive nonprofits effectively incorporate the needs, viewpoints, and assets of diverse communities into the culture and work of their organizations. Inclusive organizations must be diverse; however, diverse organizations are not always inclusive.

*—David Miller, president and CEO, Denver Foundation
from Diversity in Philanthropy (www.diversityinphilanthropy.com),
Voices and Opinions, July 2005*

A foundation's internal culture contributes to the way staff, board, donors, and volunteers feel about working together and, ultimately, to how effectively the foundation operates. An organization's culture is created and sustained by all its participants—in the actions and reactions of individuals as they interact with one another each day. While policies and procedures can help clarify and depersonalize roles and responsibilities—in the space between formal policies and informal behavior—exclusionary practices are almost always unintentional. Nevertheless, unchecked assumptions and unchallenged habits can produce a culture that consistently excludes people or fosters a lack of cooperation.

To identify your foundation's internal culture, it may be helpful to note how its formal policies and procedures differ from accepted and informal practices—and then ask, "Why?" The formal policy may be unnecessary, require better communication, or call for stronger adherence. Another approach to discerning internal culture involves reviewing whether the foundation's internal operations align with its stated values. Whatever form the review takes, it is important to note that a positive organizational culture is not without disagreement. Shared

experiences addressing different perspectives and resolving inconsistencies can be valuable steps in sustaining a positive internal culture. These discussions provide the opportunity for internal stakeholders to work together to engage in their own community-building efforts and to realize their foundation's full potential.

Key questions to consider:

- ▶▶ How might the values that guide your foundation's external efforts be applied to its internal operations?
- ▶▶ Is decision making transparent? What is the process for making decisions that affect the foundation's staff, board, donors, and volunteers?
- ▶▶ How are decisions affecting the foundation's grantmaking, management, and strategies made?
- ▶▶ How are informal decisions made (e.g., where and when to hold the staff appreciation lunch, what food and entertainment to offer at the next board or donor event, how contributions for group gifts are collected)?
- ▶▶ Does the foundation have and follow a conflict of interest policy? How has the policy been experienced by the board, donors, and staff?
- ▶▶ If applicable, what is the foundation's staff, board, and volunteer retention rate? Is retention consistent across racial, age, gender, sexual orientation, class, and other identifications?
- ▶▶ How would the foundation's staff, board, donors, and volunteers rate its internal working environment?
- ▶▶ If applicable, would staff from different functional areas (e.g., program, finance) or at different levels (e.g., executive, administrative) rate the culture, policies, and procedures differently?
- ▶▶ Whether consciously or unconsciously, do your foundation's policies and procedures favor one group or functional team more than others?
- ▶▶ How might the values that guide your foundation's external efforts be better applied to its internal operations?

4. Invite more diverse donors and perspectives into philanthropy, through new giving vehicles and leadership opportunities.

Our commitment to diversity and inclusion is also expressed in our relationships with our donors. Donor diversity is particularly imperative, as our country ... will become “majority minority” by mid-century. We cannot afford to be constrained by a foundation model predicated on the wealth of a narrow range of local residents. ... In 2003, we began organizing donor vehicles to promote and support the practice of philanthropy in communities that have been historically excluded from institutional philanthropy...

*—Terry Mazany, president, The Chicago Community Trust
from Diversity in Action: Strategies with Impact,
Rockefeller Philanthropy Advisors, 2009*

Their designations as public charities make community foundations ideally suited to introduce the idea of philanthropy to new, more diverse audiences. While other types of foundations focus exclusively on making grants, community foundations raise funds, engage with donors and nonprofits, and award grants from various pools of funds. Because community foundations manage so many different kinds of funds, they have a unique opportunity to advance the notion that donors come in all shapes and sizes and with myriad backgrounds and interests. Through an analysis of current donors, prospects, and your region’s changing demographics, your foundation can identify opportunities to reach out to emerging populations. The analysis may prompt your foundation to develop a strategy to engage donors from diverse backgrounds. Or the foundation may instead look for ways to engage donors in specific appeals—such as pooled funds for the arts, economic development, or access to health care. Relationships with philanthropic affinity groups can provide both insight and encouragement in these efforts

Key questions to consider:

- ▶▶ What are the current and anticipated demographic and socioeconomic characteristics of your area?
- ▶▶ Are there ways for your foundation to engage donors from diverse backgrounds?
- ▶▶ Do advisory committees reflect these demographics?
- ▶▶ Could outreach to diverse communities for leadership and donors increase your foundation's impact?
- ▶▶ Does your foundation have the staff and networks to begin this outreach? What would it take to develop staff and networks?

5. Hire staff from diverse populations, viewpoints, and experiences.

[T]he eyes that read and assess the proposals foundations consider are key—not just in their physical properties, but also in their experiential and perceptual characteristics. You need people at the table who can actually say: “I know those people, I know the history of that community,” ... So foundation leaders concerned with effectiveness ought to assure themselves that they’ve got diverse eyes and perspectives—not merely the appearance of diversity, not just the numerical appearance of difference, but rather the reality of experiential breadth extending beyond their own identity group or class.

*—Emmett D. Carson, Ph.D., CEO and president,
Silicon Valley Community Foundation,
The Diversity in Philanthropy Project Voices and Opinions*

Trust and credibility are among a community foundation's most valuable assets. Staff is often the face of the foundation for grantees, donors, and the public—charged with conveying credibility and earning trust. While a staff from

diverse backgrounds could be hired simply by checking characteristics off a list, a truly inclusive staff represents diversity in its many forms—from differences in race, gender, age, sexual orientation, and ethnicity to geography, education, life experience, and skill set. Moreover, the most effective hires include individuals with the capacity to investigate, engage, and show humility—qualities that are particularly valuable in philanthropy. The challenge for community foundations is to build a diverse and inclusive staff that best reflects the community and is most equipped to implement specific strategies. When confident of staff quality and capacity, a foundation board can more easily delegate the authority to execute the foundation's work.

Key questions to consider:

- ▶▶ Is your foundation's staff reflective of and credible to the communities the foundation serves?
- ▶▶ If individuals from diverse backgrounds are employed, are they positioned as—or to become—decision makers?
- ▶▶ If individuals from diverse backgrounds are employed, are they clustered in particular functional areas or departments or at certain levels?
- ▶▶ If individuals from diverse backgrounds are employed, has diversity in staffing influenced foundation decisions, effectiveness, and strategies; if so, how?
- ▶▶ Overall, how well have individuals with diverse backgrounds and experiences been retained and promoted? Has your foundation tracked retention?

6. Seek contractors and vendors from diverse backgrounds, communities, and populations.

On the investment side, we are sensitive to risk because of the commitment we've made to our donors to maintain their funds in perpetuity. Because we've found that our mission investments have performed well over time, we feel comfortable dedicating 2 percent of our investment portfolio to them.

—Ronald B. Richard, president and CEO, Cleveland Foundation, from More for Mission newsletter, Spring 2009

Diversifying a community foundation's pool of outside vendors and contractors can put its non-grant dollars to work expanding diversity and inclusive practices. Foundations might choose locally owned businesses or those operated by owners from diverse backgrounds for evaluation, project management, facilities management, catering, or other administrative assignments. Increasingly, socially responsible investing is used to align investments with a foundation's grantmaking and values. While it may not be feasible to invest all assets or funds from all donors this way, many community foundations are experimenting with investing a portion of their corpuses in socially responsible companies or in companies that benefit the foundation's region. From Minnesota to Maine and California to Kentucky, other foundations are offering donors the option of having their funds invested under socially responsible guidelines.

Key questions to consider:

- ▶▶ Do your foundation's business contracts and vendors reflect and represent diverse communities? What contracting and vendor policies and procedures might lead to greater inclusiveness?
- ▶▶ Do the foundation's contracting policies (e.g., rules regarding amount of liability insurance, number of employees, and number of existing clients) unintentionally disqualify smaller, emerging, or less well-capitalized vendors?

- ▶▶ How might the foundation tap into larger or different networks when seeking recommendations for vendors? In other words, are there vendors you are missing because they have not yet served philanthropic clients?
- ▶▶ How might your foundation's investment strategies and policies complement its mission and/or represent a commitment to diversity and inclusion?

7. Consider and enhance the impact of your foundation's grantmaking in support of diverse communities and populations.

The demographics of the Pioneer Valley—ranging from affluent, to rural and two predominantly “minority” and working class cities—influenced how the board and search committee thought about the foundation’s leadership. Because they were looking [for the foundation] to become a leader in the community, the foundation needed a CEO who brought a range of experiences and could follow through on that commitment. The kind of impact the foundation wanted to have was central to their approach to diversity.

—Ron Ancrum, president, Community Foundation of Western Massachusetts

Determining whether and to what extent your foundation's grantmaking serves diverse communities may require efforts to begin tracking the number and dollar amount of grants awarded in diverse communities. But grasping the totality and quality of your programmatic activities with regard to diverse communities requires both quantitative and qualitative data. Internal conversations among board members, as well as outreach to community leaders and nonprofits, will

help illuminate the foundation's impact in diverse communities. The process may reveal opportunities to enhance the foundation's impact by reaching out to underserved communities through relatively simple strategies of enhanced engagement—depending upon a foundation's size, history, and grantmaking focus, underserved communities of color, low-income families, immigrants, rural towns, or the elderly. You might also consider assessing and encouraging inclusive practices within your pool of grantees by requesting that applicants report the composition of their staffs, boards, and those whom the organization serves.

Far from operating as an exact science, this exploration of diversity in grantmaking will require feedback from nonprofits and communities in an ongoing process of connecting impact and inclusion in all your work.

Key questions to consider:

- ▶▶ What are the current and anticipated demographic characteristics of your area?
- ▶▶ How, if at all, does your foundation calculate the impact of its grantmaking in your region, on specific communities and populations, and on diverse and traditionally underserved communities?
- ▶▶ Do the foundation's grantmaking committees reflect and represent the communities receiving foundation grants and demographics of your area?
- ▶▶ Does your foundation's grantmaking process, including outreach activities, application procedures, and award decisions, involve individuals representing the population groups that your grantmaking aims to affect?
- ▶▶ Are there unintended disparities between declined applicants and awarded applicants?
- ▶▶ What grantmaking strategies and policies might lead to greater inclusiveness?
- ▶▶ What skills and resources would your foundation need to increase its impact in diverse communities?

8. Assess how your foundation is perceived by the public, especially diverse populations, grantees, applicants denied funding, and organizations that have not sought funding from your foundation.

The year 2001 was a wake-up call. ... It became clear to us that there was a vacuum in community leadership ... and it became obvious that ... we needed to do a better job of providing leadership and being part of the solution.

—Kathryn Merchant, president and CEO, The Greater Cincinnati Foundation, from Community Foundations Take The Lead, CFLeads, 2007

Public trust is earned arduously and lost easily. As public, donor-service organizations, community foundations must be attuned to public perception. Indeed, all foundations quickly learn that effectiveness and impact on communities often start with positive public perception. Many program officers have found that program success begins when key stakeholders start to view the community foundation as “their foundation.” Alternatively, public skepticism or poor perceptions can stop even the well-conceived programs in their tracks. Before embarking on efforts to improve outreach to diverse potential donors, grantees, and communities, foundations may want to assess how they are perceived internally and externally. Staff and board assessments, as well as outreach to residents, donors, nonprofits, and—to the extent possible—the general public can provide insight into how the foundation is viewed by diverse communities and what impact these views have on the foundation’s mission. The foundation might ask, “What do you know about the foundation? What are we doing well and what can we do better?” These efforts can be a first step in telling the community foundation’s story, demystifying its mission, making its commitment to diversity explicit, and positioning the foundation as an accessible, trusted resource.

Key questions to consider:

- ▶▶ Has your foundation sought feedback from grantees, applicants, and the public regarding its accessibility, policies, and mission? Are applications from organizations representing diverse groups increasing, decreasing, or remaining the same?
- ▶▶ What level of capacity, skills, and resources are needed to address perception issues? Does the foundation have a plan for developing this capacity?
- ▶▶ What proactive measures might help to improve the public perception of your foundation among diverse communities?

9. Consider ways to model inclusive practices in your role as a community and philanthropic leader.

San Francisco's community leaders come in many forms—newcomers, congregations, elders, youth, single mothers, and early career professionals. Our foundation has been reaching out to them and growing this leadership ... since the early 1980s. ... The San Francisco Foundation has identified and supported the work of more than 300 fellows—natural and accomplished leaders from more than 20 neighborhoods ... [these] leaders become “bridge builders” to government, philanthropy, and the corporate sector. This program deliberately enlarges their networks and their collective civic problem solving and in turn, these grassroots leaders offer the foundation a constant flow of information.

*—Sandra R. Hernandez, CEO, San Francisco Foundation;
Kurt C. Organista, assistant professor of social welfare,
University of California, Berkeley
from Diversity in Action: Strategies with Impact,
Rockefeller Philanthropy Advisors, 2009*

Community foundations often play a leadership role in their communities, and act not simply as grantmakers but as clearinghouses for issue-based knowledge and relationships. They serve as a bridge between donors and grantees by amassing critical regional and community intelligence. As grantmakers, community foundations attract the attention and talents of diverse audiences to community issues. Community foundations often consider their convening role to be integral to their effectiveness—perhaps even more so than their financial resources. When inclusive and well designed, a community foundation-led gathering can unleash the wisdom and potential of communities. Community foundations can make the most of their convening and leadership opportunities by modeling an intentional commitment to diversity and inclusive practices for others to follow. When performed well, including and engaging diverse voices help to position the foundation as a valued leader in its field. Better still, an inclusive approach to problem solving and decision making is more likely to yield more creative solutions with positive and lasting results.

Key questions to consider:

- ▶▶ Does your foundation play a convening role in your community?
- ▶▶ Is community leadership a priority for your foundation?
- ▶▶ Do gatherings planned or led by your foundation include diverse leaders and attract a diverse audience?
- ▶▶ What specialized skills does your foundation need to become an effective and inclusive convener?
- ▶▶ Does your foundation measure the success it has had playing a leadership or convening role? How might issues of diversity and inclusion be included in this assessment?

10. Share what your foundation is learning about diversity and inclusive practices.

Poor race relations are “the elephant in the room” that no one discusses in Milwaukee. In a recent survey in the region, 84 percent of the respondents indicated that race relations are very important to the future of the region. However, whites (57 percent), blacks (72 percent), and Latinos (46 percent) feel that race relations are either “not so good” or “poor.” Our efforts to promote diversity are based upon two realities: improving race relations for solving many of our community’s public policy issues and realizing that the Foundation cannot be an effective partner, convener, and advocate for improved programs and policies unless it has a diverse board, staff, and vendors.

*—Doug Jansson, president, Greater Milwaukee Foundation, from *Leading by Example: Diversity, Inclusion, and Equity in Community Foundations*, Coalition of Community Foundations for Youth and California Tomorrow*

Sharing lessons learned about diversity may be the most powerful yet least performed suggestion in this guide. Because diversity and inclusive practices include a continually evolving set of ideas and strategies, sharing what has been learned is critically important. Yet, opportunities to share and reflect on these topics come too infrequently. In a field sometimes criticized for overemphasizing process, foundations rightfully want to spend time working toward diversity and inclusive practices, not discussing it. Most community foundations are simply too busy working in communities and intuitively making course corrections along the way to take the time to map out what they’ve learned. But, with the stakes so high, sponsoring data collection and research can help focus community attention and inform challenging conversations. With their standing in, and long-term commitments to, their local communities, community foundations are uniquely positioned to support research and share what they’ve learned about diversity and inclusive practices. In doing so, these foundations are likely to spur actions that

go far beyond their own initial investment. Increasingly, foundations are sharing their approaches to diversity and inclusive practices through annual reports, commissioned studies, Web sites, social media, and personal narratives. Nevertheless, it is through reflecting and sharing that lessons become most vivid and instructive. With the stakes so high, these discussions must be sensitively designed, facilitated, and documented. By tracking and sharing your foundation's efforts, you will be helping to provide concrete evidence that diversity and inclusive practices in philanthropy result in greater effectiveness and impact.

Key questions to consider:

- ▶▶ What do foundations need to learn and do to become more diverse and inclusive? What is working for your foundation?
- ▶▶ Does your foundation track its progress in becoming more diverse and inclusive?
- ▶▶ How does your foundation share key successes, challenges, and lessons, and with whom?
- ▶▶ Who could benefit from the lessons your foundation has learned?
- ▶▶ Who are the best foundation representatives to share these lessons?
- ▶▶ What are the most appropriate times and venues for your foundation to share what you have learned about diversity and inclusive practices?

Resources

To read:

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9. Minnesota Council on Foundations, Diversity Resources Web page, accessed December 21, 2009;
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10. LGBT Self-ID Community of Practice, “Where are Our LGBT Employees?” May 8, 2009;
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12. **Reports from Marga Incorporated:**
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<http://www.margainc.com/catalog/freereports.php?report=8&title=Lessons%20Learned%20In%20Racial%20Equity>.
 - *Race, Culture, Power, and Inclusion in Foundations: A Report Conducted for the Annie E. Casey Foundation*, Marga Incorporated, March 2005;
<http://www.margainc.com/catalog/freereports.php?report=3&title=Race%20Culture%20Power%20and%20Inclusion%20in%20Foundations>.
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http://racialequity.org/docs/Racial_justice_assessment_loresFINAL.pdf.
 - “Measuring What We Value,” *Critical Issues Forum*, Vol. 1, April 2008;
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15. *Grantmaking with a Racial Equity Lens*, Grantcraft and the Philanthropic Initiative for Racial Equity, 2007; <http://www.grantcraft.org/index.cfm?fuseaction=page.viewPage&pageID=840&nnodeID=1>.
16. David Bleckley and Mary McDonald, *Review of Michigan Foundations’ Organizational Policies for Diversity and Inclusive Practice*, Council of Michigan Foundations, April 2009;
http://www.michiganfoundations.org/s_cmf/bin.asp?CID=11362&DID=25968&DOC=FILE.PDF

17. Survey Instruments:

- “Survey of California Foundations,” Foundation Center, Web document accessed December 21, 2009;
http://foundationcenter.org/gainknowledge/research/pdf/ca_diversity_2009_survey.pdf.
- “Survey of New York Metro Area Foundations,” Foundation Center, Web document accessed December 21, 2009;
<http://foundationcenter.org/diversitymetrics/Survey%20of%20NY%20Metro%20Area%20Foundations.pdf>.
- “Survey of Michigan Foundations,” Foundation Center, Web document accessed December 21, 2009;
<http://foundationcenter.org/diversitymetrics/Survey%20of%20Michigan%20Foundations.pdf>.
- “Survey of Minnesota Foundations,” Foundation Center, Web document accessed December 21, 2009;
<http://foundationcenter.org/diversitymetrics/Survey%20of%20Minnesota%20Foundations.pdf>.
- “2008 COF Foundation Salary and Benefits Survey—Section IV Staff Compensation,” Foundation Center, Web document accessed December 21, 2009;
<http://foundationcenter.org/diversitymetrics/2008%20COF%20Foundation%20Salary%20and%20Benefits%20Survey%20-%20Section%20IV%20Staff%20Compensation.pdf>.

Get to Know:

1. Council on Foundations: Diversity & Inclusive Practices

<http://www.cof.org/programsandservices/diversity/>

The Council on Foundations has a comprehensive plan to both promote and advance diversity and inclusive practices in philanthropy, and to embed and institutionalize diversity within the Council.

2. Diversity in Philanthropy / D5

http://www.diversityinphilanthropy.com/about_us/proj_descrp/

The Diversity in Philanthropy Project is a voluntary effort of leading foundation trustees, senior staff, and executives committed to increasing field-wide diversity through open dialogue and strategic action.

3. Forum of Regional Associations of Grantmakers (the Forum)

http://www.givingforum.org/s_forum/search_new.asp?CID=35&DID=42

The Forum's online Knowledgebase—a collection featuring resources from 32 regional associations, their 4,000 grantmaking foundation members, and colleague philanthropic partners—offers a list of current reports and articles related to diversity in philanthropy.

4. **Center for Effective Philanthropy (CEP)**

http://www.effectivephilanthropy.org/assessment/assessment_gpr.html

CEP, in consultation with foundation leaders and grantees, is developing a new module of questions on racial diversity for its grantee survey.

5. **The Aspen Institute Roundtable on Community Change**

<http://www.aspeninstitute.org/policy-work/community-change/structural-racism-resources>

The Roundtable on Community Change focuses on the problems of distressed communities and seeks solutions to individual, family, and neighborhood poverty by convening leaders, conducting applied and policy research, serving as a technical advisor, and distilling lessons. The roundtable's work focuses on two areas: community change and structural racism.

6. **Government Resources:**

- Standards for the Classification of Federal Data on Race and Ethnicity, U.S. Office of Management and Budget, August 1995;
http://www.whitehouse.gov/omb/fedreg_race-ethnicity/
- Revisions to the Standards for the Classification of Federal Data on Race and Ethnicity, U.S. Office of Management and Budget, accessed on the U.S. Census Bureau Web site, December 21, 2009;
<http://www.census.gov/population/www/socdemo/race/Ombdir15.html>



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