



COUNCIL *on* FOUNDATIONS

CAREER PATHWAYS TO PHILANTHROPIC LEADERSHIP

Conversation on Diversity and Inclusive Practices

Talent

Leadership

Conversation

Highlights

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Baseline

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 a 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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Executive Summary

On October 22, 2009, more than 50 foundation executives, trustees, human resources officers, search firm consultants, and representatives from organizations that support philanthropy (e.g. funder networks and regional associations) convened at the invitation of the Council on Foundations (Council) to consider issues of diversity and inclusion in philanthropic leadership.

The event, made possible through a generous grant from the Charles Stewart Mott Foundation, was part of the Council's ongoing efforts to advance diversity and inclusive practices in philanthropy, especially among its members.

Council CEO Steve Gunderson set the stage for the first-of-its-kind meeting at which the Council released its research on foundation executive appointments, *Career Pathways to Philanthropic Leadership: Baseline Report*. The research offers new insights into the professional backgrounds, demographic characteristics, and key qualifications of successful candidates for CEO and executive director positions in philanthropy. The half-day program explored the specific research findings on: (1) factors that can influence hiring committees; and (2) measures that can boost diverse candidates' chances for success.

In addition, the executives heard from and probed a five-member panel of leaders in philanthropy and executive recruitment about fresh personal experiences with the search, hiring, and transition processes. The panel consisted of two recently appointed foundation presidents, a foundation trustee with search committee experience, and two senior search firm representatives.

Executives in attendance drew the following lessons from the day's conversations.

- ▶ Exposure to decision makers and networking are the most effective measures for preparing future leaders for senior and executive roles in philanthropy.
- ▶ Succession planning, staff development, and transition strategies are critical to opening leadership opportunities to internal candidates.

- ▶ Prioritizing a candidate's competency and creating a welcoming culture at the organization are necessary to attract and retain diverse leaders.

Participants in the conversation compiled a short list of ways the Council, with the help of its members, could support inclusive search and hiring practices throughout the field:

- ▶ Conduct further research and produce case studies, as appropriate.
- ▶ Connect search firms with broad knowledge of diverse candidates with foundations seeking executives from diverse backgrounds, and outline the case for diversity and inclusion.
- ▶ Produce case studies of successful searches, hiring strategies, and transition planning involving diverse and internal candidates for leadership roles in philanthropy.
- ▶ Introduce the Next Gen to careers in philanthropy and offer programs to mentor them early in those careers.

These invaluable recommendations will be considered for the Council's Career Pathways Pipeline Program, which launches this spring.

Because of the emphasis on diversity, there is more diversity in the program staff. But, as the research suggests, because of the tendency to go outside the field for CEOs, many of the well-prepared, diverse candidates within foundation program departments are being cut off at the pass, indicating that efforts to diversify lower staff positions is not the right way to influence and diversify leadership and executive positions.

—Foundation Senior Staffer

Introduction

This report features highlights from a convening the Council on Foundations (Council) hosted, with support from the Charles Stewart Mott Foundation, as part of the Council's ongoing efforts to establish diversity and inclusive practices as part of the structure of philanthropy. The Council's inclusiveness work is focused on four areas:

1. increasing the pipeline of candidates for leadership positions in the field and expanding inclusive practices in the search, identification, hiring, and retention processes
2. developing and promoting educational programs and tools
3. communicating the importance of diversity and inclusiveness
4. supporting the Council's role in the Diversity in Philanthropy Project and the transition to a next phase of the collaboration

The unique meeting brought together stakeholders in the hiring process to exchange ideas, discuss hiring trends, and share insights into executive search and related talent acquisition strategies. The goals of the meeting were:

1. to identify factors that help candidates enter the pool and successfully compete for philanthropic leadership positions
2. to examine the dynamics that influence search firms, search committees, and other institutional decision makers
3. to recommend tactics by which the Council's soon-to-be-launched Career Pathways Pipeline Program can expose aspiring executives from diverse backgrounds to networks, decision makers, experiences and leadership opportunities

Boards should not consider diversity to be a "check box," but a means to advance their mission. When they see it [as advancing their mission], they are more willing to provide a support system for the person. I would argue that we need not just pathways for diverse leaders, but *throughways* to success.

—Search Firm Executive

Research Review

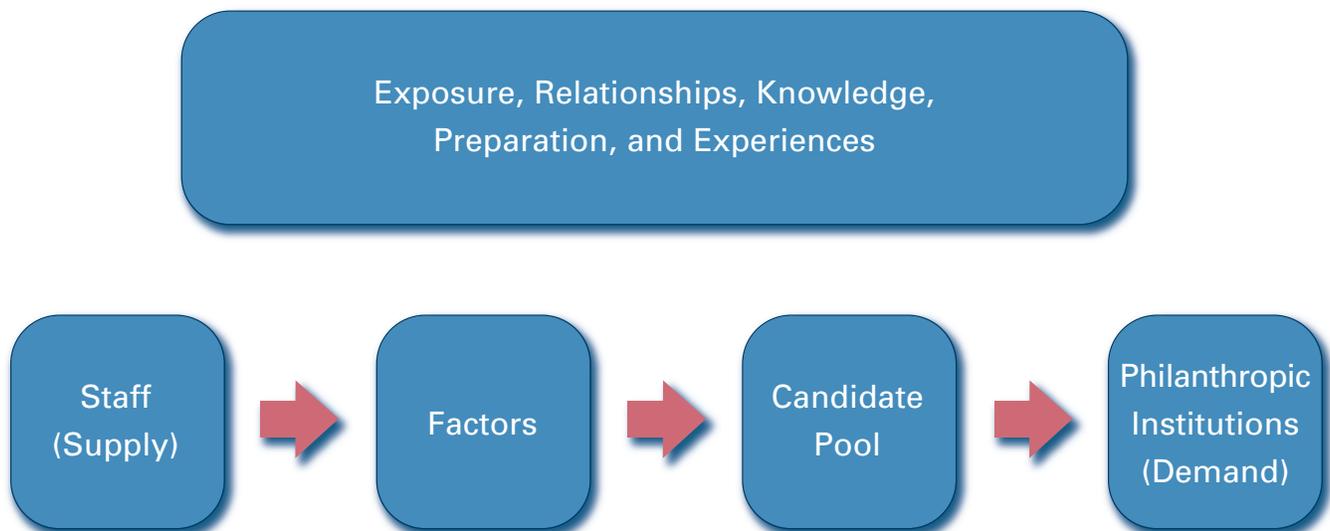
The conversation on diversity and inclusive practices in philanthropy kicked off with a review of *Career Pathways to Philanthropic Leadership: Baseline Report*, the Council's new research on how individuals make their way to top positions in philanthropy and how philanthropic organizations choose their leaders. The research was designed to help the Council:

1. learn more about the professional and individual characteristics of those hired into foundation executive positions
2. suggest ways to strengthen the Council's efforts to expand the Career Pathways to Philanthropic Leadership program
3. support the field's ability to enhance hiring practices
4. bring attention to the need for future research in this area

The study findings uncovered whether successful candidates were promoted from within the appointing organizations, worked previously for other foundations, or entered philanthropic leadership from a different field—i.e. the government, business, or nonprofit sector. The study also captured data about the race, ethnicity, and gender of the study cohort.

Through structured interviews with 50 foundation CEOs, trustees, search firm executives, and other colleagues, the Council's research identified primary elements in moving candidates from diverse backgrounds successfully along the pathway to senior and executive roles in foundations. Research results found that exposure and relationships were critical to a candidate's success.

What is the Pathway?



I am surprised by the data presented in this research. The data regarding appointment of external candidates is very bad news for the foundation community. I consider it a success if we choose the internal candidate. External candidates are more of a risk. And, frankly, I find it an indictment of the foundation world that we do not hire more from within this field.

—*Search Firm Executive*

The research revealed six key findings:

1. The majority (79.5%) of the 440 foundations appointing CEOs and executive directors during the study period filled them not through internal promotions but from candidates outside the foundations.
2. Most of the successful candidates (63.4%) held executive positions in their immediate prior position as either chief executive (38.9%) or vice president (24.5%) before successfully landing in their current position.
3. The majority of the successful candidates made the transition from fields outside of philanthropy—primarily from the business (24.3%) and nonprofit (24.8%) sectors.
4. Of the successful candidates, nearly 20 percent were from racially and ethnically diverse backgrounds and about half (48.7%) were women.
5. Thirty percent of field leaders who were interviewed said mentors played a major role in their career advancement.
6. About 85 percent of the interviewees expressed significant skepticism about the willingness of trustees, search consultants, and other hiring decision makers to be influenced by leadership development efforts (such as fellowship programs that train new leaders) as they contemplate hiring decisions about executive candidates.

The ensuing discussion among the assembled executives focused on research findings about (1) factors that can help candidates from diverse backgrounds achieve leadership positions; and (2) factors that can positively influence hiring committees and other decision makers.

What factors affect candidates from diverse backgrounds in becoming foundation leaders?

- » There is no halo for internal candidates. In fact, they may be at a disadvantage when viewing their current position and lack of access to board members and other decision makers.
- » Grantmaking, as a skill or profession, seems to be undervalued, particularly by these boards represented in the study cohort.
- » Research suggests that philanthropy lacks a commitment to develop internal staff.
- » Expertise in issues and strategies can trump candidates' experience inside an organization or inside the philanthropic sector.
- » Foundation boards are right to value the importance of skills and experiences derived from the corporate, public, and nonprofit sectors.
- » When philanthropic staff move outside philanthropy to gain different experience, it would be helpful to identify a logical pathway to re-enter the field.

Perhaps two-thirds of candidates coming from outside philanthropy are a good thing. An outside perspective is a good thing.

—*Search Firm Executive*

- ▶ More diverse boards will lead to more diverse staff and executives.
- ▶ When “executive experience” is the primary quality sought by search committees, it is even more challenging to recruit diverse candidates because the pool of today’s nonprofit and for-profit executives lacks diversity.

I question how we define “external.” External candidates may come from outside an *organization*, but they may be very “internal” to the foundation’s issue area. They may be so familiar to the board and staff that they function like an internal candidate.

—*Search Firm Executive*

Trustees can have an overly romantic image of their next CEO. It is unlikely that the trustee will see those qualities in existing staff. The trustee just does not see the staff candidate as the new, glorious, charismatic leader. I am not so discouraged by the data in the report, however. The data show that a number of leaders did come from the nonprofit sector. If these leaders have fundraising experience, I believe they can offer a lot to a foundation.

—*Search Firm Executive*

What factors influence search committees, search firms, and decision makers?

- ▶ Philanthropy should embrace a holistic approach to diversity and inclusion, not only in its hires, but also in its board appointments.
- ▶ Unintentional bias about “what leadership looks like” can exclude internal candidates as well as candidates from diverse backgrounds.
- ▶ Because most boards are risk-averse, many try to take the risk out of the equation. Some still see candidates from diverse backgrounds as risky.
- ▶ Smaller foundations, which are less likely to use search firms, need help looking beyond their geographic boundaries and personal networks to identify and recruit diverse candidates.
- ▶ Boards set the example, for better or worse. If boards prioritize diversity in their own ranks and activities, then diversity will be a priority for the organization.
- ▶ The relevance of diversity to a foundation’s mission, long-term plan, issue area, or region seems to be the catalyst for considering diversity in hiring decisions.
- ▶ Diversity and inclusive practices would be valued more if an economic, effectiveness, and “mission-driven” case could be made to boards.

Panel Discussion

The afternoon's panel comprised five philanthropic leaders and executive recruiters: two recently appointed foundation presidents, a foundation trustee with search committee experience, and two senior search firm representatives. Each panelist reflected on his or her personal experiences and on factors shaping the executive hiring process.

Personal Experiences in the Hiring Process

Ron Ancrum, president, Community Foundation of Western Massachusetts

Before speaking here today, I was able to talk with board members who hired me. I asked them what made me a viable candidate. They said my foundation knowledge (from being an executive director of a regional association); my experience as a foundation board member; and my proven experience managing a staff and board, overseeing financial systems and budgets, and hiring and firing employees.

Diversity was something that was discussed. Hiring an African American man was a change from my predecessor. The board wanted someone who could work with donors *and* with an increasingly diverse community. My

One of the challenges for search firms is that the pathways of diverse and internal candidates may look different from those of traditional candidates. We have to help boards value different pathways, without overstepping our role and becoming advocates.

—*Search Firm Executive*

commitment to community leadership coincided with the board's current and future priorities. The foundation's mission and vision led directly to the board's interest in diversity for the community foundation. Nevertheless, the board still had concerns about whether I would have the regional credibility. Moving from Boston to Western Massachusetts was seen as a potential problem.

Deborah Hoover, president, The Burton D. Morgan Foundation

My path into foundation leadership took many turns. My first grantmaking experience was serving on the New Hampshire Council for the Arts while I was early in my career practicing law. I loved that experience so, in my work as a lawyer, I began focusing on nonprofits. I found my way into a program position with the GAR Foundation in Akron, Ohio. The GAR Foundation, along with several others, was housed in a law firm. I worked at GAR for about a year, and then after some time away I worked there again. I eventually left GAR to become second in command and then president of another foundation, which also was housed in the same law firm.

I was fortunate to find a mentor—another lawyer—who really proved essential to my career success. When the time was right, he supported my move from the GAR Foundation to the other foundation, where I could have greater responsibilities.

Eighty percent of appointees were white/Caucasian. As the world changes, we need to train and influence boards to understand the importance of diversifying foundation leadership. We must rise to this challenge and address the 80 percent issue. This is the larger, more important challenge.

—*Foundation Senior Staffer*

**John Morning, trustee,
Charles Stewart Mott Foundation**

I've been on a number of search committees as a nonprofit board member. In each case, we have looked for three broad qualities in the candidates. We looked for a visionary, a great administrator, and a great fundraiser. These qualities overlap, but are rarely found at the same level in one candidate. Search committees have to prioritize one or another and that can depend on the specific demands of an organization.

You look for people who've had results and have an analytical capacity. Beyond that, I think individuals have to be able to effectively promote the professional and civic stature of an organization. Search committees look for *character*.

**Sheryl Ash, vice president and director,
Isaacson, Miller**

I'd like to focus on a recent search experience that resulted in the selection of a candidate from a diverse background. The board in this case was impressed by the set of experiences the candidate brought to the position and how [the candidate] fit with what the board perceived to be the foundation's next big challenges (i.e., to engage more fully with the community).

This board was focused on the "long view." They asked themselves over and over, "Where do we want to be in five years?" Candidates are well-served by recognizing the board's key questions and bringing a vision and some experience that match.

At the trustee or board level, in my experience serving on boards, there is never a question about developing the capacity of the senior team. Until that becomes important for the board, staff development is not going to happen.

—*Search Firm Executive*

When I first entered the executive search field, I heard a number of boards say about potential candidates, "I'll know it when I see it." This approach held a lot of bias and did not support diversity. I am hearing less and less of that today. Still, it is important to ask, "Why are you seeking diverse candidates? Why would diversity help your foundation achieve its mission?"

—*Search Firm Executive*

**James Weinberg, founder and CEO,
Commongood Careers**

In 90 percent of our searches, diversity is ranked in the top five of attributes sought. In 20 percent, it is ranked as the number one attribute. This seems like a relatively new occurrence, and I am wondering what has changed and how we got to this point.

I think it might be useful to ask: "Why is diversity a key attribute? What does diversity bring? What does it mean?" This would help ensure that a diverse pool is not just about appearances. With increased demand, I wonder whether there is enough being done to ensure that there is a greater supply of candidates from diverse backgrounds.

**Factors Influencing Searches and
Successful Transitions**

**Ron Ancrum, president,
Community Foundation of
Western Massachusetts**

The demographics of the Pioneer Valley—Springfield and Holyoke being predominantly minority and working-class communities—influenced the board and search committee greatly. They were looking for the foundation to become a leader in the community and needed a CEO who could signal and follow through on that.

Have we done a good job of including the range of diversity, including disability, sexual orientation, etc.? At [my foundation], we haven't done particularly well considering the full range of diverse backgrounds and experiences.

—*Foundation Trustee*

A few factors made a huge and positive difference in my transition experience. I was fortunate to be able to spend time with my predecessor when I first arrived, because he was retiring. Beyond that, the entire organization prepared for my arrival. The development team made a list of the donors and prospects I needed to meet during my first 90 days. And, I met them. Program staff did the same with events I needed to attend and people with whom I needed to connect. When an organization is changing its culture and identity, the transition period is especially important.

**Deborah Hoover, president,
The Burton D. Morgan Foundation**

The donor and former executive director of my foundation had identified me as a possible successor. I didn't know that until after I became president, but I learned that my appointment had been part of the succession planning for several years. The former executive director recognized that I was competent and ambitious and responded by investing in my professional development.

**John Morning, trustee,
Charles Stewart Mott Foundation**

I would like to cut to the chase and say that none of the laudable goals related to diversity is possible until foundation and nonprofit boards become more diverse themselves. Boards have to commit to changing and becoming more diverse. While boards are becoming somewhat more diverse, there is room for improvement.

Search firms need to encourage more diverse representation on nonprofit and foundation boards, even if those conversations are difficult. Finally, I don't underestimate the role of the CEO in making an organization focus on diversity; I have never seen a situation where diversity was achieved without the CEO involved. This is not something that bubbles up from the mailroom. It starts at the top.

**Sheryl Ash, vice president and director,
Isaacson, Miller**

Returning to my earlier remarks about the recent hiring of a candidate from a diverse background, one key factor was that both the search committee chair and the board chair were committed fully and equally to building a diverse pool of candidates.

Another important factor was the diversity in the makeup of the search committee itself. There was more than just one "minority" represented on the search committee, and this helped keep diversity in the fore. The committee didn't rely on just one person to do that job.

Nevertheless, committee members still had reservations about an African-American candidate toward whom they were leaning. They worried about whether he would "fit" with the culture of the region and the organization. Could he raise money from the golf-playing white guys?

Gen X and Y are different from Boomers. It is incumbent on us right now to understand the differences between the generations. Making organizations more inclusive means changing culture—not only how the staff and board look, but also how technology, reward systems, and inclusive practices work.

—*Search Firm Executive*

Three things in searches are important, in this order. First, leadership development within organizations. Too few organizations in any sector spend enough on developing the capacity of internal candidates. Next, the willingness of trustees or board members to take a risk and hire someone who has not yet done the CEO job. This is why boards tend to ask search firms to look for candidates in parallel positions, which by definition exist only externally. Finally, the third step is to figure out why and how to seek leaders from diverse backgrounds.

—*Search Firm Executive*

This conversation was not up-front, but it definitely occurred in the background. In the end, committee members determined that the foundation should be more focused on its grantmaking role in the community—and because the community was diverse and becoming more so, they committed to this candidate.

James Weinberg, founder and CEO, Commongood Careers

My firm works with 150 organizations in 50 states, and we talk a lot with clients about bringing leaders up from within the organization. Organizations that only look outside for their next leader miss the potential of individuals already in the organization. These organizations also fail to grasp the unrecorded costs of this practice. When individuals see no way up and no investment in capacity building, they leave.

Another factor influencing the hiring process is the lack of “on ramps” to enter philanthropic employment. While there is eagerness among nonprofit staff to enter philanthropy, few know exactly how to do so. And fewer will succeed because of the relatively small number of jobs available. Nevertheless, I think groups supporting philanthropic organizations (such as identity-based groups and funder networks) could do more to make the sector accessible. Opening doors, especially for younger people, would eventually help to diversify the field’s leadership.

Finally, I would caution us to think carefully about our use of the words “culture” and “fit.” I believe that boards conflate *diversity* and *culture*. Boards will reject candidates based on “cultural fit.” Let’s unpack the potential bias inside of terms like “culture.”

[My foundation] has committed resources to leadership development programs, especially in education. We know these efforts have worked in other fields. We have tracked outcomes and have seen that the program for superintendents has resulted in former fellows moving into public K-12 school superintendent positions. I would like to know why interviewees within philanthropy do not find this plausible.

—*Foundation Senior Staffer*

Lessons and Recommendations

Following a candid dialogue between panelists and event participants, the participants turned their attention to capturing lessons learned about the executive appointment process as well as about the process of leadership transition. They reached the conclusions below.

Lessons Learned from the Conversation

Exposure to and networking with decision makers are the most effective measures for preparing future leaders for senior and executive roles in philanthropy.

- ▶ The field needs to better understand the competencies that help philanthropic leaders be as effective as possible.
- ▶ Mentors are critical to helping candidates find training. Mentors also can make recommendations to search firms. The field needs to support more fellowship and mentorship programs.

Both the panel and the research findings (which indicate that leaders are coming from external organizations and other fields) led me to think about the lack of succession planning. I attribute it to boards not forcing current CEOs to plan for succession. CEOs rarely do this on their own. They need the board's encouragement. Boards might hesitate to do this because they do not want to scare the CEO into thinking [his or her] job is vulnerable. But, succession planning is simply the responsible thing to do.

—*Foundation Trustee*

We talk to senior staff in organizations and they often say, "I have to move out to move up." Often, executives hold their trustees so close that other staff members do not have access to them. As a result, trustees never see other staff—potential future leaders—in any capacity or see them only in minor roles. When current executives do not share relationships with the trustees, trustees are more likely to say: "We've got to do an outside search." They just don't know any senior staff well enough.

—*Search Firm Executive*

- ▶ Philanthropy needs to open doors to networking. Currently, if you are not in the field, you have little access to the field.
- ▶ Leadership skill sets include management (e.g., staff, budgeting and board relations), executive experience, and geographic experience.
- ▶ New graduate programs in philanthropy might help by recruiting diverse students and tracking where graduates are hired.

Succession planning, staff development, and transition strategies are critical to opening leadership opportunities to internal candidates.

- ▶ A lack of succession planning in philanthropy can influence how leaders are selected and whether internal candidates are even considered.
- ▶ Both boards and current CEOs must commit to creating a succession plan and developing staff. Search firms can encourage this but, ultimately, boards and staff must collaborate on succession planning.

- ▶ Leadership transition plans—or “on-boarding”—should be part of every CEO search. The board and the search firm should jointly map out the first 90 to 120 days for the successful candidate.

Prioritizing a candidate’s competency and creating a welcoming culture at the organization are necessary to attract and retain diverse leaders.

- ▶ Organizations must have a receptive climate to both seek and keep leaders from diverse backgrounds.
- ▶ Organizations must be willing to change and adapt as candidates from diverse backgrounds come on board. Culture will continually evolve as new and different perspectives are included.
- ▶ Too much emphasis is placed on “culture” and “fit”—a better lens would be individual competency. “Cultural fit”—or lack thereof—sometimes provides neutral cover for bias.
- ▶ Retaining staff from diverse backgrounds can prove just as challenging as recruiting them. Organizational culture can create either a hospitable or an inhospitable environment.

Culture is a red herring in diversity discussions. The business of the organization is not culture, it is competence. I think culture is a too-often-used excuse for rejecting diverse candidates.

—*Foundation Trustee*

Recommendations for the Council on Foundations

After reviewing the research, gaining insights into the appointment process from panelists, and outlining lessons learned, participants were asked to suggest actions for the Council to consider—with the field’s support—in advancing inclusive search and hiring practices through its new Career Pathways Pipeline Program. The following list summarizes participants’ recommendations.

Corporate diversity programs can provide models, but they, too, have struggled. Organizations must try to make the environment hospitable for candidates from diverse backgrounds. This means they have to change the culture of the organization. They have to look at things like mentors, board relationships, even the holidays they provide. If they don’t look at the whole picture, they will not be able to sustain all the hard work put into finding and hiring diverse candidates because they will not stay.

—*Foundation Trustee*

Recommendation 1:

Conduct further research and produce case studies, as appropriate.

- ▶ The Council should ensure that its programming includes not only a focus on the supply side of the leadership equation (candidates) but an equal focus on the demand side (institutions, boards, decision makers, human resources staff, and search firms).
- ▶ Survey a meaningful sample of program officers to determine interest in moving into management, and, similarly, survey decision makers, trustees, and human resources personnel to determine the availability of executive career opportunities.

I am happy to have the data from the research. But, in thinking about these data, I began to think about the data I wish we had. I think the better question is: what makes a leader effective? And, then, what role do these other characteristics play in supporting that effectiveness? When we know that, we will have better context for discussing and encouraging diversity.

—*Search Firm Executive*

At the philanthropic infrastructure organization I led, we looked at the demographics of the people leaving leadership positions and compared it to those who were hired to replace them, over three years. We actually saw a decrease in the number of women and a decrease in persons of color. This change in diversity as positions turn over is critically important. To what degree is a sector becoming less diverse?

—*Foundation Executive*

Recommendation 2:

Connect search firms with broad knowledge of diverse candidates to foundations seeking executives from diverse backgrounds and outline the case for diversity and inclusion.

- ▶▶ Search firms should build an active database of candidates from diverse backgrounds for nonprofit board service. The Council should serve as a catalyst between foundations seeking board members from diverse backgrounds and search firms who know of such candidates.
- ▶▶ The Council should provide search firms with “the case for diversity,” so they can bring that into the process with an authoritative voice.
- ▶▶ The field should consider the role of culture carefully and with an understanding of its complexity.

Recommendation 3:

Produce case studies of successful searches, hiring strategies, and transition planning involving diverse and internal candidates for leadership roles in philanthropy.

- ▶▶ The Council should hold another meeting on this research just for foundations trustees.
- ▶▶ The Council should help search committees grasp the actual workings of foundations. Search committees are sometimes made up of board members with little understanding of how the foundation actually works.
- ▶▶ The Council should help CEOs transition new employees by promoting the importance of training and transition plans.
- ▶▶ The Council should share the *Career Pathways to Philanthropic Leadership: Conversation on Diversity and Inclusive Practices* with foundations preparing to engage in a search process.

For those of you in the field of finding candidates, sometimes individuals get hired and the search firm goes away. But all candidates have strengths and weaknesses. Search firms are in a position to know both strengths and weaknesses and, without undermining the candidate, can help organizations create training programs that support new executives. Search firms can help the board understand the usefulness of this kind of program.

—*Foundation Trustee*

I am surprised about the mixed feelings related to the importance of organizational culture. I think it is critical to your success in recruiting and retaining leadership and staff. Our organizational development consultant and I have had conversations about how to sustain a positive culture and continue the evolution of our organizational culture through a future CEO change. A saying our current CEO likes to use: “Culture will eat strategy for lunch.”

—*Foundation Staffer*

Most foundations are small, that is they are small-staffed and have few resources to hire a search firm. Providing support to these organizations as they go after talent is important. Otherwise they are more likely to rely on the relationships and personal networks of board members.

—*Infrastructure Executive*

Recommendation 4:

Introduce Next Gen professionals to careers in philanthropy and offer programs to mentor them early in their careers.

- ▶▶ The Council should develop a program to help philanthropy professionals early in their careers (e.g., a three-day institute, including advice about career development).
- ▶▶ The Council should offer scholarships and/or internships for Next Gen professionals interested in philanthropic careers.

Leadership development is important. The pipeline is critical. But, boards need help finding the right candidates of color and reaching out to them. If you are not in the field, you can't connect at all. And, individuals from diverse backgrounds, as we now know, are less likely to be in the field already. Networks and relationships are the most important.

—*Foundation Executive*

The Council should start a program for new CEOs to assist them in their transition. Market it to members: “You’ve just hired someone. We can help him or her hit the ground running.” Even before he or she starts that kind of training would be tremendous.

—*Foundation Executive*

Closing Statement

The structured, half-day conversation among stakeholders and decision makers in executive hiring provided an expanded context for the findings of *Career Pathways to Philanthropic Leadership: Baseline Report*. The convening also increased awareness of the senior and executive appointment process, offering critical information for building the Council's program to advance diversity and inclusive practices in philanthropy. Invaluable comments and recommendations from participants at the convening will be incorporated into the Career Pathways Pipeline Program, which launches this spring.

Diversity in philanthropy is not just board and staff. As a recruiter, I encourage you to look at the vendors that philanthropic [institutions] use, so that we address all the different ways diversity can have its place in the field.

—*Search Firm Executive*

Appendix — Participant List

Leadership Conversation on Diversity and Inclusion in Philanthropy: Pathways to Senior and Executive Appointments, October 22, 2009

Foundation Trustees & Executives

Ron Ancrum

President

Community Foundation of
Western Massachusetts

Michael Balaoing

(via telephone)

Senior Vice President

Entertainment Industry Foundation
Board Member

Council on Foundations

Chair, Committee on Inclusiveness,
Council on Foundations

Diane Bell-McKoy

President and CEO

Associated Black Charities

Stephanie Bell-Rose

(via telephone)

President

The Goldman Sachs Foundation

Janet Borth

(via telephone)

*Director of Human Resources and
Board Services*

Charles K. Blandin Foundation

Bernadette Christiansen

Vice President, Human Resources

The McKnight Foundation

Gail Christopher

Vice President for Programs

W.K. Kellogg Foundation

Steve Clyne

(via telephone)

Director of Recruiting, Human Resources

Bill & Melinda Gates Foundation

Phyllis Glink

(via telephone)

Executive Director

Irving Harris Foundation

Debbie Green

(via telephone)

Human Resources Specialist

W.K. Kellogg Foundation

Theo Gregory

Vice President

El Pomar Foundation

Deborah Hoover

President

The Burton D. Morgan Foundation

Dianna Langenburg

(via telephone)

Human Resources Manager

W.K. Kellogg Foundation

John Morning

Board Member

Charles Stewart Mott Foundation

John Natoli

Board Member

The McKnight Foundation

Kimberly Roberson

Program Officer

Charles Stewart Mott Foundation

Maureen Siwula

Human Resources Director

Greater Milwaukee Foundation

Cole Wilbur

Trustee

The David & Lucile Packard Foundation

Gary Yates

President and CEO

The California Wellness Foundation

Search Firm Executives

Sheryl Ash

Vice President and Director

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We make every effort to ensure the accuracy of the contents of this report. Should you discover an error or omission, please direct them to our attention at inclusiveness@cof.org and accept our sincerest apologies.



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