

# STATE OF THE WORK

2014

**Tackling the Tough Challenges to  
Advancing Diversity, Equity, and Inclusion**

Fourth in an Annual Series

D5 is a five-year effort to advance philanthropy's diversity, equity, and inclusion. More than a dozen organizations with connections to thousands of grantmakers came together to found the D5 Coalition. Since then, the coalition has grown and continues to grow. For a complete list of allies and partners, please see the D5 website: [www.d5coalition.org](http://www.d5coalition.org). The founding coalition included:

Asian Americans/Pacific Islanders in Philanthropy  
Associated Grant Makers  
Association of Black Foundation Executives  
Council on Foundations  
Council of Michigan Foundations  
Donors Forum  
Foundation Center  
Fundors for LGBTQ Issues  
Hispanics in Philanthropy

Horizons Foundation  
Joint Affinity Groups  
Minnesota Council on Foundations  
Native Americans in Philanthropy  
Philanthropy New York  
Philanthropy Northwest  
Philanthropy Ohio  
Rockefeller Philanthropy Advisors  
Women's Funding Network

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Rockefeller Philanthropy Advisors  
serves as D5's program office.

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## FOREWORD

# DIVING DEEP INTO DIVERSITY, EQUITY, AND INCLUSION



Now solidly in D5's fourth year, we are seeing momentum toward advancing diversity, equity, and inclusion (DEI) in philanthropy. Long-time advocates are redoubling their efforts while an expanding network of philanthropic leaders are bringing fresh energy to the cause.

The State of the Work provides an opportunity to share many of the lessons we are learning from this rising interest in strengthening the common good by advancing diversity, equity, and inclusion. In prior State of the Work reports, D5 has outlined data and activity. In 2011, we shared what we knew in terms of numbers, data, and best practices. In 2012, we shared the perspectives of advocates within philanthropy to increase the sector's attention to these issues. In 2013, we offered in-depth learning profiles of foundations tackling these issues, along with the perspectives of thought leaders facilitating efforts within their own institutions.



This year we are going for something different. What has been most encouraging to me, after almost 30 years of work on these issues in the field of philanthropy, is the willingness of a broader and often unexpected array of philanthropic leaders to take on meaningful conversations, to take their organizations beyond checking boxes and posting diversity statements. Going deep requires an analysis and an informed point of view. This is especially true around the most complex issues such as equity, the role of leadership, and the use and meaning of data.

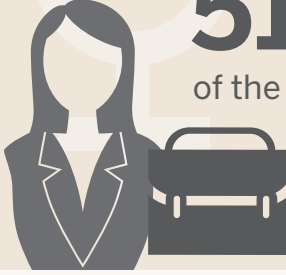
In the 2014 issue of the State of the Work, we asked three scholars/practitioners to provide perspectives and analysis on these issues and to present a charge to their peers in philanthropy. We hope that their perspectives will push the field to go deeper, to engage in dialogue and debate, and to keep at it.



As we enter the home stretch of D5's five-year effort to advance philanthropy's diversity, equity, and inclusion, we are focused on motivating leaders in philanthropy—like you—to take action in support of this cause. I invite you to participate in our Take 5 Campaign ([d5coalition.org/the-take-5-campaign](http://d5coalition.org/the-take-5-campaign)) and commit to advancing diversity, equity, and inclusion within your organization or the broader field. Together, we are making philanthropy stronger.

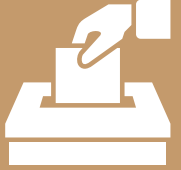
Kelly Brown  
D5 Director


# DIVERSITY, EQUITY AND INCLUSION: CHALLENGES & OPPORTUNITIES


Members of the **baby boom generation**  are more likely than previous generations to have a **disability**.<sup>1</sup> 

Women are **51%** of the U.S. workforce, but only **5%** of Fortune 500 CEOs.<sup>2</sup> 

The gap in median income between white and Hispanic households in **2012**  IS WORSE THAN WHAT IT WAS IN **1972**.<sup>3</sup> 

In 2012, **African American** Millennials who said they voted outpaced **white** Millennials 65% to 58%. 

People of color are **79% more likely** than whites to live in neighborhoods where **industrial pollution** is suspected of causing **health problems**.<sup>5</sup> 

The power of LGBT people in national elections continues to rise. **1 million more voters identified as LGBT in 2012 than in 2008.**<sup>6,7</sup> 

1. <http://www.prb.org/Publications/Articles/2013/us-baby-boomers.aspx>;  
2. <http://management.fortune.cnn.com/2013/05/09/women-ceos-fortune-500/>;  
3. <http://www.pewresearch.org/fact-tank/2013/09/18/four-takeaways-from-tuesdays-census-income-and-poverty-release/>;  
4. <http://harvardpolitics.com/hprgument-posts/african-american-millennials-extremely-politically-engaged-hispanic-millennials-less-enthusiastic/>;  
5. <https://www.dosomething.org/tipsandtools/11-facts-about-environmental-racism>  
6. <http://www.washingtonblade.com/2012/11/07/exit-poll-gay-voters-made-up-5-percent-of-2012-electorate/>;  
7. <http://www.fec.gov/pubrec/electionresults.shtml>

# INTRODUCTION

As the facts on the prior page illustrate, the diversity of America is growing in number, visibility, and influence. Many of these communities—people of color, women, LGBT people, and people with disabilities—have historically been excluded, holding them back from reaching their full potential and contributing the full breadth of their talents and energy to society.

For philanthropy, these communities present a unique opportunity. Just imagine how we could better advance the common good if we tapped the potential of these rapidly growing communities within the constituencies we serve.

D5 is a five-year coalition to advance philanthropy's diversity, equity, and inclusion. We are a collaboration of foundations large and small, individual donors, regional and national associations, and organizations that focus on diverse communities. Together, we are a growing movement in philanthropy to ensure those who have been historically excluded can bring their voices and expertise to the decision-making table and pave the way for the field to become more effective in creating opportunities for all communities to thrive.

We are working to advance four major sector changes by the end of 2015:

- **Recruit diverse leaders** for foundations, including CEO, staff, and trustees
- **Identify the best actions** we can take in our organizations to advance diversity, equity, and inclusion
- **Increase funding** for diverse communities and ensure that foundations offer all constituencies equal opportunity to access the resources they need to thrive
- **Improve data collection** and transparency so we can measure progress

The State of the Work series is intended to inform the field of progress toward these changes. State of the Work 2014 takes a closer look at the challenges. It features three essays from accomplished researchers and practitioners that identify the lessons we must heed to do this work effectively, and share possibilities for creative solutions that can increase our impact.

In addition to the essays, you'll learn about the Take 5 Campaign and other resources that can help you directly take action, hear about lessons learned from D5's work in 2013, and preview plans for the remainder of 2014.

# DEFINING DIVERSITY, EQUITY, AND INCLUSION

## Diversity

The word “diversity” can mean different things to different people. We define it as those who bring a unique perspective or life experience to the decision-making table, but focusing particularly on:

- Racial and ethnic groups: Asian Americans and Pacific Islanders, Hispanics/Latinos/Latinas, African Americans and other blacks, and American Indians and Alaska Natives
- LGBT populations
- People with disabilities
- Women

D5 uses this broad definition of diversity because this is what our communities look like in the 21st century and beyond. Our definition focuses on populations that historically have been—and remain—underrepresented in grantmaking, among practitioners in the field, and have historically been excluded in the broader society. To have real impact in a diverse and complex world, organized philanthropy must effectively include these voices and draw upon them to intentionally engage issues of diversity, equity, and inclusion in an authentic way.<sup>1</sup>

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## Equity

Improving equity means promoting justice, impartiality, and fairness within the procedures and processes of institutions or systems, as well as their distribution of resources. Tackling equity issues requires an understanding of the underlying or root causes of outcome disparities within our society.<sup>2</sup>

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## Inclusion

Inclusion refers to the degree to which individuals with diverse perspectives and backgrounds are able to participate fully in the decision-making processes of an organization or group. While a truly “inclusive” group is necessarily diverse, a “diverse” group may or may not be “inclusive.”<sup>3</sup>

## WHERE WE STAND WHAT CURRENT DATA SAY ABOUT DIVERSITY, EQUITY, AND INCLUSION IN PHILANTHROPY

The current data on progress toward the four major sector changes, presented below, are very similar to the data from State of the Work 2013. If the data are accurate, then philanthropy is not keeping up with the changing face of America. But unfortunately we can't tell definitively if philanthropy is ahead or behind. Not all foundations report on the demographic makeup of their organizations and their grantmaking. We are working on improving the data collection mechanism that currently exists, and are optimistic that this system can be streamlined and made more accurate and efficient. But we will only really be able to answer questions about diversity, equity, and inclusion if more foundations are transparent with the data already at their fingertips and engage with their peers to design systems that accommodate the diverse approaches of our field and accurately reflect the true nature of our investments.

Note that the currently available data—presented below—have limitations: 1) the relatively small number of foundations that share demographic information about their boards, staff, and grantees represent only a slice of philanthropy and are not reflective of the sector as a whole; 2) only funding that is specifically identified as benefiting a given community is counted toward funding for that community.

### Foundation Staff & Board Diversity

	CEOs/ Presidents <sup>1</sup>	Other Full-time Executive Staff <sup>1</sup>	Board/ Trustees <sup>2</sup>	Program Officers <sup>1</sup>	Total U.S. Management/ Professional Workforce Composition <sup>3</sup>
<b>RACE/ETHNICITY</b>					
Caucasian	92%	84%	87%	64%	82%
African American	3%	5%	7%	16%	9%
Latino	2%	4%	4%	11%	8%
Asian/Pacific Islanders	1%	4%	5%	7%	7%
American Indian	.4%	.4%	.5%	1%	N/A
Bi/Multi-racial	.4%	1%	N/A	1%	N/A
Other	.3%	1%	N/A	.3%	N/A
<b>GENDER</b>					
Female	54%	64%	38%	77%	51%
Male	46%	36%	62%	23%	49%
<b>LGBT</b>					
	N/A	N/A	2%	N/A	
<b>PEOPLE WITH DISABILITIES</b>					
	N/A	N/A	1%	N/A	

Note: Percentages may not total 100 percent due to rounding and missing data

1. Based on a sample of 864 independent, family, community, corporate, public, operating, and other foundations that provided full-time staff details. Data from Grantmakers Salary and Benefits Survey, Council on Foundations, 2013.
2. Based on a sample of 518 independent, family, community, and public foundations. Data from COF Management Survey, Council on Foundations 2010.
3. Bureau of Labor Statistics; Race/Ethnicity figures, 2012; Gender figures, 2013

### Funding Diverse Populations

	Annual Average (2009-2011)		
	Amount	%	% of Total US
Ethnic or Racial Minorities	\$1,860,687,814	10.4%	37%
Women & Girls	\$1,313,742,520	6.7%	50.8%
People with Disabilities	\$745,998,296	3.8%	19%
LGBT	\$57,485,116	0.3%	2.8%

**OVERALL GRANTS TOTALS \$19,795,451,115**

### Funding Ethnic or Racial Minorities

	Annual Average (2009-2011)		
	Amount	%	% of Total US
General (Unspecified)	1,194,879,952	6.1	n/a
African Americans & Blacks	348,051,068	1.8	13.1
Hispanics & Latinos	265,048,718	1.4	16.9
Native Americans	72,874,234	0.4	1.2
Asians & Pacific Islanders	62,504,705	0.3	5.3
Other Minorities	43,865,963	0.2	.5

Source: Foundation Center 2014. Based on an average of all grants of \$10,000 or more awarded between 2009-2011 by a matched sample of 737 of the largest foundations (by total giving). U.S. Census Bureau: 2012 State and Country QuickFacts.

**BARRIERS AND  
SOLUTIONS TO  
ADVANCING DEI**  
LEARNING FROM  
THE FIELD



Advancing diversity, equity, and inclusion is hard—but developing a deep understanding of the challenges to success is critical to ultimately achieving it. We've asked three authors to lay out some of the barriers and solutions to achieving success in key areas:

- Understanding that diversity is not enough—diverse leadership does not ensure equity
- Preparing leaders and allies to take on tough and often overlooked issues like structural racism
- Building the will and the way for improving field-wide DEI data collection and transparency

We hope that these perspectives will provide food for thought for philanthropic leaders who stand ready to tackle these challenges.



### **Charting a New Destiny: Walking the Equity Walk**

By Ange-Marie Hancock, Associate Professor, Political Science & Gender Studies, University of Southern California



### **Advancing Diverse Leaders: The Importance of Allies & Leadership**

By Todd Vogel, Managing Director, Loom



### **Elusive Philanthropy Data: Identifying Populations Served & Ensuring Foundation Participation**

By Gerri Spilka, Founding Director, OMG Center for Collaborative Learning



# CHARTING A NEW DESTINY: WALKING THE EQUITY WALK

ANGE-MARIE HANCOCK, ASSOCIATE PROFESSOR, POLITICAL SCIENCE  
& GENDER STUDIES, UNIVERSITY OF SOUTHERN CALIFORNIA

## OPPORTUNITY: UP-AND-COMING PHILANTHROPISTS HUNGRY FOR EQUITY

D5 is part of a sea change in philanthropy regarding diversity. That sea change is bolstered by research that suggests that diverse work environments can contribute to higher productivity when primed to focus on tasks at hand.<sup>4</sup> It is also supported by a large set of tools and models emphasizing racial diversity in particular for organizations to utilize.<sup>5</sup> Together with success stories from across the country, it is easier than ever to make the business case for starting the conversation about diversity.

Sustained conversations also continue to bear fruit. Diversity appears in community foundations and population-based funds via their personnel decisions, programmatic practices, and board selection procedures.<sup>6</sup> Moreover in the past two years foundation boards have selected Darren Walker (Ford Foundation), LaJune Montgomery Tabron (W.K. Kellogg Foundation), Earl Lewis (Mellon Foundation), and Jim Canales (Barr Foundation) to lead their institutions in what State of the Work 2013 called “an increasingly diverse and complex world.”<sup>7</sup> Diversity in philanthropy continues to grow.

These new leaders, deeply embedded in the sector prior to their ascent to the top, are as much a part of a larger generational shift in philanthropy as they are part of any “diversity” shift. Across North America, nearly \$30 trillion in intergenerational wealth transfer will occur between the years of 2031 and 2045.<sup>8</sup> Inheriting these funds are younger generation philanthropists who are impatient with the status quo and push to end intractable social problems rather than treat the symptoms.<sup>9</sup>

## CHALLENGE: DIVERSE LEADERSHIP DOES NOT GUARANTEE EQUITY

What does such growth signal for equity? Equity is equally important but much harder to achieve. Why? Often the arrival of new and diverse leadership is followed by the assumption that invigorated attention to equity will logically follow. This logic, which extends from the programmatic shifts that often coincide with the arrival of a new leader, situates equity in individuals rather than policies and processes that contribute to organizational and sector-wide transformation. This assumption limits our ability to achieve equity.

The use of inclusion as a process to achieve equity is equally suspect. “Inclusion” assumes that there is an impenetrable center of privileged power that conditionally accepts the homogenous marginalized group as long as they contribute to harmonious continuation

of the status quo. These implicit expectations further place the responsibility on the marginalized to get in where they fit in, rather than on the organization’s responsibility to change to accommodate a changing internal and/or external context.<sup>10</sup> Moreover, inclusion-oriented logic does not allow us to discuss the diversity of outcomes among marginalized populations themselves—making it that much harder to develop the business case for equity. How do we respond when skeptics resist calls for equity by pointing to a black president of the United States, a gay Latino president of a family foundation, or the first woman with disabilities elected to Congress (who is also, for the record, half-Thai and straight)?

Often we can’t. Pursuit of equity requires a different companion process—social transformation. By social transformation I mean a process “so deep and thorough that a reversal to previous conditions is impossible,” for the demographic changes occurring in the U.S. by mid-century are equally permanent.<sup>11</sup>

Framed in this way social transformation is indeed a tall order. Luckily metrics do exist to measure the required “transactions and transformations” of organizations and organizational impact on intractable problems.<sup>12</sup> But knowing the process has a name and metrics associated with it does not make walking the equity walk any less daunting. How do we pursue fair access to opportunity and treatment for all in order to reduce “disparities in opportunity, access, and indicators of well-being?”<sup>13</sup> Can we cultivate the institutional and personal courage to continue the “unsocial” conversations and disturb the unspoken norms?

## A CALL TO THE FIELD: DIVERSITY, EQUITY & SOCIAL TRANSFORMATION BY 2042

First, we must ensure that we are properly diagnosing the problem. Consider the lives of Barack Obama, Jim Canales and Tammy Duckworth noted above, and how each represents combinations of privilege and disadvantage that have changed, not remained static, over time. There has been widespread, cross-sector use of the term “intersectionalities” to talk about identities or dimensions of diversity with comparatively little recognition that everyone, not simply those with multiple marginalized identities, simultaneously possess relative advantages and disadvantages that change over time.

When used properly, intersectionality helps us understand complex relationships between historical legacies, individual-organizational interactions, and what experts call the “hidden biases of good people,” or implicit bias.<sup>14</sup> Such biases’ resistance to eradication obligates us

to focus on policy, not simply the good works of certain people. I propose a public pledge that looks ahead to the demographic change set for 2042. DESTiny 2042 (Diversity, Equity and Social Transformation) would be guided by three principles to bolster our collective courage to pursue social transformation and equity policies that lead our organizations and grant-making to mirror the demographic reality by 2042.

**Understand that intersectionality is an analytical framework to help us ask the right questions rather than define characteristics of individual identities.** Utilizing intersectionality as an analytical framework allows us to simultaneously attend to historical legacies and progress, to what grantees and population funds have in common and what makes them qualitatively different, and to situate the roles of individuals as embedded in organizations, communities, and nations. Understanding the historical legacies and progress element of intersectionality, for example, gives us the courage to acknowledge the relative paucity of diversity tools for understanding gender, sexuality, and disability compared to those available for racial/ethnic diversity without descending into a zero-sum, unproductive discussion of “who’s most excluded,” that reproduces fears of being “passed over,” blindness to dimensions of one’s own privilege, and backlash when attention is shared among equally compelling challenges.<sup>15 16</sup>

**Define leadership beyond “the cult of the diverse individual or grantees” to institutionalize social equity.** Individual leaders and leading organizational collaborations like D5 are essential catalysts for the pursuit of equity and social transformation but sustaining leadership is the responsibility of everyone. Done properly, intersectional analysis provides connection points for everyone throughout the organization to expand their notion of leadership in vital ways. The Research Center for Leadership in Action project identified the need to address the mental models of leaders people carry around in their heads. Their broad emphasis on “leadership” rather than individual or organizational “leaders” has two particular benefits: it is constructed as an effort “where differences are embraced rather than

being a source of dominance and conformity pressures” and it sees leadership as a collective effort and accomplishment.<sup>17</sup>

Decentering the “who is the leader?” question to instead focus on leadership as a process of a group and its existence in multiple locations and forms on both sides of the grantmaker and grantee relationship allows the philanthropic sector to move beyond the inclusion-driven process of engaging a broader set of stakeholders to ensuring substantive representation across differently situated stakeholders.<sup>18</sup> Answering questions like: “What procedures will safeguard the voices and interests of the less powerful? How will agendas be set? How will human commonalities and differences be recognized without resorting to essentialism, false universalism, or obliviousness to historical and contemporary patterns of inequality?”<sup>19</sup> is one helpful social transformation approach that has been used in the area of women’s health.

**Overcome skepticism and resistance to policy changes.** Resistance to social equity emerges from concerns about change that is simultaneously emotion-laden and protective of existing power relations. Lowering the stakes by emphasizing aspirations to do better rather than spotlighting how others are wrong, and basing policy change in collective responsibility where marginalized populations are not forced to cover, enhances productivity without minimizing the damage caused by legacies of racism, sexism, ableism, or homophobia.<sup>20</sup> Evaluating equity impact based on transactions and transformations grounded in collective responsibility, transformation of existing social structures, and collaborative methods of change enable task-oriented organizational change that marries the best research on diversity and commitment to sustained social transformation.

*Ange-Marie Hancock is Associate Professor of Political Science & Gender Studies at the University of Southern California.*

## Suggested Resources

### **Intersectionality: Moving Women’s Health Research and Policy Forward**

Women’s Health Research Network

### **Project Implicit [Bias]**

A non-profit organization and international collaboration between researchers who are interested in implicit social cognition.

### **Research Center for Leadership in Action**

The leadership center at NYU Wagner.



# THE IMPORTANCE OF ALLIES & LEADERSHIP

TODD VOGEL, MANAGING DIRECTOR, LOOM

## THE CHALLENGE: THE MYTH OF A “POST-RACIAL” SOCIETY

After President Obama’s 2008 election, people started talking about a “post-racial” society, and the novelist Colson Whitehead got tired of it. He wrote a satire for the *New York Times* and nominated himself as the country’s “secretary of post-racial affairs.”<sup>21</sup>

In Whitehead’s sendup, racism is not a deep problem. Rather, it is a “branding problem.” Setting the country straight becomes simple, and he revises popular culture accordingly. Whitehead’s new post-racial world turns Spike Lee’s “Do the Right Thing”—the Academy Award-nominated film about racial tensions in a black neighborhood on a blistering hot day—into a Brooklyn hipster block party. Instead of the burning, bare-fist riot with police brutality in the movie’s climax, this event sends its proceeds to a charity for people with mild “inconveniences.”

Whitehead illustrates how, when we wipe race from our analysis, we have very little that is useful to say or do. A post-racial world-view blunts any call for real change. His satire makes it easier to see how our society can express broad popular support for diversity and passively watch events like Trayvon Martin’s killing. It lays bare the contradiction of leaders saying that diversity is “of course important,” and their inability to take concrete action. Without leadership that can clearly articulate race’s role in American society, we overlook that race predicts so many life outcomes. And we fail to look for deep causes. Therein lies the question for leaders in philanthropy: if we deny America’s racial contradictions and refuse to confront them, if we fail to cultivate leaders who focus us on these deep contradictions, how can we bring real change?

## TAKING ON STRUCTURAL RACISM: THE IMPORTANCE OF LEADERSHIP & ALLIES

Leaders get paid to make things happen, and they should head straight for the action: embedding race and class as the basis of how philanthropists address societal problems. They need to make it clear that the organization works on diversity and equity not for its brand promise but because it holds the key to achieving its mission. How do you ensure that all people—regardless of race or income—have access to jobs and clean air and water? How do you ensure that race does not predict people’s access to public services or their life expectancy? For most of us, no diversity and equity means no success, and leaders need to constantly remind themselves and their organizations of that.

Leaders also need to manage how the organization focuses on race. Today racism too often gets reduced to a few nasty people acting horribly, shocking stories that sound distant from most of our lives. Focusing on the individual often keeps us from probing deeper. The bigger payoff, which requires the enlistment of allies from all quarters, comes from changing institutions and collections of institutions, or structures. Through its long history, America has created an elaborate shorthand for translating “race” into power, forging the very concept of “whiteness” to capture privilege for a select group.<sup>22</sup> This is not an accusation. The evidence is minutely documented in studies by historians like David Roediger and legal scholars like Ian F. Haney-Lopez.<sup>23</sup> An understanding of how white privilege grew and changed becomes important in mostly white organizations, where allies need to speak openly about white privilege and practices that sustain it. Whites, no matter how humble their origins, have benefited. We need the courage to own the fact and to work with vigor to dismantle its support system.

Organizations’ leaders set the tone for this difficult work. Leaders keep their teams focused on how they do their jobs better when they put racism in society’s institutions and structures at the center of their work. Even rudimentary data illustrates wide racial disparities in access to education, public transit, clean air, and living-wage jobs. The data also helps us to target funds at those gaps and to achieve what most of us have set as our goal: to ensure that all people enjoy society’s opportunities. With this clear focus, the organization is then prepared to pursue answers to important new questions that arise. How can we have a strong community impact without strong community collaboration? How can we collaborate with the community without mutual trust? How can we develop trust if we don’t appear before the community with a deep organizational understanding of equity and, centrally, a diverse staff?

## WHAT’S NEEDED: A DEEP UNDERSTANDING OF UNFAIR STRUCTURES

A strategic focus on institutions and structures loosens us from predictable patterns and creates new approaches. Former Seattle Mayor Greg Nickels led the city, for example, to acknowledge the institutional and structural roots of race and class and to use an equity toolkit to develop programs.<sup>24</sup> The result changed a broad set of the city’s practices, from issues seemingly far away from race, like how it replaced bulbs in street lights, to how it zoned neighborhoods largely populated by people of color. The Funders Network for Smart Growth and Livable Communities worked for a decade to cultivate

philanthropists' sophistication in working with race and class and people and place. One of its efforts, its PLACES program, develops this structural understanding among program officers and arms a new generation of leaders with new tools. It found that its emerging leaders, program managers from more than 50 foundations around the country, sharpen their focus on institutional and structural racism when they steep themselves in race's cultural and historical role in society. And, to develop their tools, they need to see many examples of techniques to dismantle barriers.

### A CALL TO THE FIELD: WHAT YOU CAN DO TO HELP ADVANCE DIVERSE LEADERS

Leaders need to ensure that key building blocks are in place to change their organizations and to advance diverse leaders.

- **Mission.** Articulate in crystal-clear terms how diversity and equity helps the organization achieve its mission. PLACES Fellows whose leaders support them in this way generate more options for implementation and, perhaps most important, have more energy to bring change.
- **Analysis.** Clearly define the difference between individual racism (nasty people acting horribly with prejudice) and institutional and structural racism (policies, practices and procedures that work to the benefit of white people and to the detriment of people of color, often inadvertently). This helps depersonalize the change process and keep the focus on equitable outcomes that align with the mission.
- **Data & Metrics.** Putting data on the table and connecting it to outcomes central to the organization's mission make clear what work needs to be done and aligns everyone's efforts.
- **Tools.** A racial equity toolkit, like the ones developed by the City of Seattle, the Annie E. Casey Foundation, and Social Venture Partners, Seattle, creates a clear link between data and the policies or programs that need to be implemented to promote equity. Having these tools in-house and broadly understood makes equity an organization-wide challenge, takes some of the

pressure off diverse leaders to do the equity thinking for everyone, and frees up time and energy to bring their other talents to the organization.

- **Support.** Clear missions, an analysis shared organization-wide, clear data, and widely understood tools all support diverse leaders. But the path to equity is never a straight line. The PLACES program helps fellows maintain momentum with a one-on-one coach—a role that organizational leaders and other allies can provide. Leaders also can create a learning cohort in which the members help sustain one another. Every change maker needs others on the same difficult path to talk them through tough spots, to exchange new ideas and to help map the important way-points on the journey.<sup>25</sup>

Our organizations equally need to advance diverse leaders in other traditionally marginalized groups, including gender, class, and sexual orientation. Bringing organizational change in all these areas is complex because the historical and cultural conditions that created institutional and structural racism differ from those that created inequitable institutions and structures around gender, class, and sexual orientation. Many of us may live our lives at the intersection of these categories, but in organizations each area demands its own specific strategy. Leaders craft targeted interventions that dismantle structural and institutional barriers in one area. With the insight and support they develop, they should move, relentlessly, to the next. Putting race on the table first allows leaders to confront an issue that often divides marginalized communities.

We need all our leaders to pull together. We need to sharpen our tools and our focus. Most of all, we need a common understanding that none of us will do our jobs well unless we confront, courageously and relentlessly, the hard questions around the structures that stand between us and our mission. Only then will we move past the pat, branded, messages like post-racialism and bring real, lasting change.

*Todd Vogel, Ph.D., is Managing Director of Loom, a foundation that funds at the intersection of the environment and equity. He also is board chair of Social Venture Partners, Seattle and board member of The Funders Network for Smart Growth and Livable Communities.*

## Suggested Resources

### **Whiteness of a Different Color** (Cambridge: Harvard University Press, 1999)

An overview of the history of whiteness and its changing shape in the U.S.

### **Grantmaking with a Racial Equity Lens**

An overview for using an equity filter for making resource decisions within an organization

### **Racial Equity Tools**

Tips for cultivating data made possible by the Center for Assessment and Policy Development, MP Associates, and World Trust Educational Services



## ELUSIVE PHILANTHROPY DATA: IDENTIFYING POPULATIONS SERVED & ENSURING FOUNDATION PARTICIPATION

GERRI SPILKA, FOUNDING DIRECTOR OF OMG CENTER FOR COLLABORATIVE LEARNING

### THE OPPORTUNITY: BETTER UNDERSTAND—AND MAXIMIZE—THE IMPACT OF INVESTMENTS

Amidst a rapidly changing demographic landscape, including an expanding Latino population, record numbers of women graduating from college and increasing numbers of people living with disabilities, we must ask ourselves: is philanthropy and is the social sector at large staying ahead of these trends and living up to their ideals?

Unfortunately, the answer is, “we don’t know.” Answering this question requires reliable and integrated data—data about who within foundations are making decisions, and about what organizations and causes benefit from grantmaking. These data can help us understand who foundations impact, and how and where philanthropy can have a greater impact. This is a tremendous opportunity for philanthropy, and it is within our reach.

Across society, whether in education, business, government or entertainment, we expect real-time data that are easily accessible and visually appealing. And yet philanthropy as a field has not embraced these trends nor harnessed the opportunities that they present. Where constellations of foundations have collected and shared common data, deeper collaborations have taken root and produced shifts in funding and programs toward equity issues and greater impact. Knowing where there are disparities—and opportunities for impact—makes it possible to act strategically, collectively, and with urgency.

Currently, when it comes to data, many foundations are silos. They track data about DEI differently, or not at all. They share data differently, or not at all. Despite the mountains of data that foundations do collect, philanthropy still cannot speak reliably about who it is impacting and how. In addition, nonprofits operate in their own silos, and while they are increasingly charged with collecting and sharing data on their own impact, often at the request of foundations, the data about who they serve and how are often unclear or incomplete. Strengthening the data collection capacity of the social sector as a whole is critical. Rather than work in fragmented silos, it ought to be done in concert with the range of partners using and analyzing the data.

Much more needs to be done, particularly to address the dearth of systematic data about equity-focused investments. Understanding who philanthropy serves is as important as capturing the issue focus of a grant, be it education or health or workforce development or arts

and culture, since those and all issues manifest in different communities very differently.

To make it happen, we have to establish a uniform data collection and reporting approach that includes demographic data, and encourage the whole field to use it. We have to clarify who will use the data and how, and we have to identify the most effective and least burdensome ways to collect and share data. When we do these things, philanthropy will know its true impact and if it is doing all that is possible to promote the common good.

### THE CHALLENGE: COORDINATION, PARTICIPATION & CAPACITY

After decades of trying and failing to understand the national philanthropic DEI story, few would argue the importance of developing this system. This system requires two data thrusts: 1) internal foundation reporting on staff and board leadership demographics, and 2) external data about grantee constituent demographics, and dollars spent for diverse grantee populations. It’s achievable, but the field must navigate a complex set of national, individual foundation, and grantee level contexts, each influenced by interacting political, inter-organizational, technical, capacity, and institutional identity dynamics.

**Increased foundation data demands.** Expanded data reporting has come with internal foundation consequences. Staff require new technical skills, expanded responsibilities, and often increased staff numbers. Yet, foundation boards and presidents, eager to keep overhead at a minimum, are reluctant to invest in this type of expense. Moreover, the many foundations with limited or no support staff or grants managers struggle to prioritize data collection and management.

**DEI data for learning and dialogue.** Foundation DEI data carry a unique subset of political issues. Many foundations, including some foundations that have long been at the forefront of DEI issues, harbor fears that these data will be used against them as a means to judge their intentions and progress. Similarly, experience in a few regional DEI data pilots reveals that when nonprofits are asked by foundations to provide demographic data about their staff, boards, and populations served, they too are afraid of being judged and punished for not having achieved full diversity in their leadership and service. Foundations must learn to address these fears by focusing conversations on the value added of knowing the constituents they intend to serve, and modeling the use of data for learning and dialogue, and as

a positive tool for intentional change as opposed to punitive assessments.

**Learning to coordinate across the sector.** Coordinating across foundations alone is a task unto itself, as foundations are notoriously independent and largely focused on and driven by their own interests. However, to develop a shared approach to DEI data system development, it is essential for the field to work effectively inter-organizationally. Foundations, infrastructure groups, regional associations, and nonprofits must coordinate interests and data collection for quality data to emerge from the field. Agreeing on a standard format, points of collection, and taxonomies are central, as is gaining the buy-in of the full range of stakeholders in the field of philanthropy.

**Building broad participation.** Achieving broad participation requires champions to understand and articulate simply the field-wide, foundation, and grantee organizational effectiveness benefits gained from collecting and reporting on internal foundation and beneficiary DEI data. Messages must be tailored to different stakeholders to illustrate the value added to those particular players. Further, to mobilize the essential nonprofit participation, engaging nonprofits in making the case and in the full system design, implementation, and use of data system will assure that their unique perspectives and challenges are incorporated into the final system.

**Addressing technical capacity.** Critical for launch is to identify cost and capacity barriers, and to advance corresponding solutions for infrastructure organizations, foundations, and nonprofits. Developing a workable business model is particularly necessary to sustain the effort. Technical obstacles to data entry need to be minimized or eliminated, and data ownership and confidentiality issues must be resolved. Once resolved, the foundation and the grantee community

need to learn definitions of shared taxonomies (i.e., how to ask and interpret basic questions). Further, despite investments in institutional capacities to collect, use, and share data, many foundations, as well as nonprofits, remain technology-challenged, a fundamental organizational adaptive skill.

### **A CALL TO THE FIELD: STEPS TO DEVELOPING A FIELD-WIDE DEI DATA SYSTEM**

Philanthropy is ready to develop, collect, and share a set of diversity metrics. Believing that these metrics have the potential to transform philanthropy, the field should actively engage in:

1. Developing, piloting, and adopting a shared nonprofit organizational diversity data taxonomy and template.
2. Incorporating diversity standards in other national philanthropic data efforts.
3. Strengthening strategy and tactics to drive public will-building for DEI data system development.

For those interested in supporting these efforts, start by reaching out to organizations at the center of collecting, coordinating or highlighting field-wide data on diversity, such as D5, the Council on Foundations or the Foundation Center. If the field as a whole can address this challenge, we'll have a clearer understanding of who distributes and who benefits from philanthropic investments, allowing us to measure our progress and adjust our policies and practices to maximize impact.

*Gerri Spilka is the Founding Director of OMG Center for Collaborative Learning.*

## **Suggested Resources**

### **Diversity Metrics Forum: Proceedings**

Foundation Center (2010) in collaboration with the Diversity in Philanthropy Project.

### **Grantmaking to Communities of Color in Oregon**

Foundation Center (2010) in collaboration with Grantmakers of Oregon and Southwest Washington.

# D5 PROGRESS & LEARNING IN 2013-2014

D5's five-year effort reached its midpoint in 2013. Much of the focus so far has laid the groundwork for a growing movement. A number of long-term projects came to fruition during the latter half of 2013 that have set the stage for much more visible and widespread impact in the coalition's final two years.



# LEADERS

## GROWING OPPORTUNITIES & ENGAGEMENT

### **BUILDING THE PIPELINE**

Building on the Council on Foundations's 2009 research for its Career Pathways leadership program, D5 spent early 2014 researching existing leadership programs across the country that prepare or enhance the careers of diverse individuals in philanthropy. In May 2014, D5 completed an inventory of leadership pipeline programs, which will be converted into a readily searchable database tool on the D5 website.

### **ONBOARDING MORE LEADERS: D5 AT THE MIDPOINT**

In October 2013, D5 hosted an event in New York that brought together current DEI champions, including newly-appointed D5 co-chair Luz Vega-Marquis of the Marguerite Casey Foundation, with potential new allies from foundations, infrastructure groups, and other organizations across the field. Three of the D5 founding partners—Dr. Robert K. Ross, President & CEO, The California Endowment; Sterling K. Speirn, then President & CEO, W.K. Kellogg Foundation; and Stephen B. Heintz, President, Rockefeller Brothers Fund—used the opportunity to engage new stakeholders in a conversation about advancing the four big sector changes and, just as importantly, enlisting new champions as leaders in the effort to grow the movement.

### **ENGAGING LEADERS THROUGH PRESENTATIONS AND PERSUASION**

D5 expanded its outreach efforts to new leaders this year through panels and presentations at convenings and through print and social media pieces. These efforts provoked thoughtful discussion about DEI as necessary components for foundation effectiveness and as entry points for collaboration. Highlights include:

- Session at 2013 Council on Foundations Annual Conference “Engaging the Heart and Mind of Philanthropy”
- *Huffington Post* blogger Claudia Jacobs features D5's work in blog post
- D5 guest blog about “D5 at the Midpoint” event for the Center for Effective Philanthropy
- D5 panel presentation at INROADS event, “The Power of a Dream: Diversity in Philanthropy”

# ACTION

## CREATING TOOLS & SPREADING THE WORD

### ANALYSIS OF POLICIES, PRACTICES, AND PROGRAMS FOR ADVANCING DIVERSITY, EQUITY, AND INCLUSION

In fall 2013, D5 released a comprehensive scan and analysis of scores of written and web-based resources on policies, practices, and programs that advance DEI. Conducted by JustPartners, Inc, the analysis identified:

- Five critical elements to advancing DEI
- Models, tools, and on-ramps for DEI work
- How the field continues to struggle in addressing equity (although it is making progress on diversity and inclusion)
- Need for more and better data collection
- A quintessential online guide that provides quick access to DEI resources

### GOING DEEPER WITH A NETWORK STRATEGY

Recognizing that most philanthropy occurs on the local level, D5 complemented its national work by implementing a regional strategy, which targets DEI resources and support to pre-existing and emerging local networks in select geographic regions of the country. The strategy broadens the reach of the national movement by strengthening regional DEI work, developing replicable strategies, and building ongoing capacity in local networks to have impact beyond 2015. Presentations about the regional strategy occurred at meetings of the Philadelphia Program Officers Roundtable, Philanthropy Network Greater Philadelphia, Chester County Funders Group, and at the Forum of Regional Associations' annual conference in Milwaukee. Boston, the Pacific Northwest, and Philadelphia are among the first regions that are poised for action.

D5 explored and nurtured relationships with issue-based affinity groups, search firms, and professionals representing various positions in foundations (e.g., human resources, grants managers) to develop targeted strategies for mobilizing new champions and tailoring resources to their needs.



*D5 commissioned JustPartners, Inc. to identify the most effective policies, practices and programs to advance DEI.*



*D5 is implementing a regional strategy, which is deepening the roots of the national movement.*

# FUNDING

## SPOTLIGHTING POPULATION-FOCUSED FUNDS & DIVERSE DONORS

### RESEARCHING AND STRENGTHENING POPULATION-FOCUSED FUNDS (PFF)

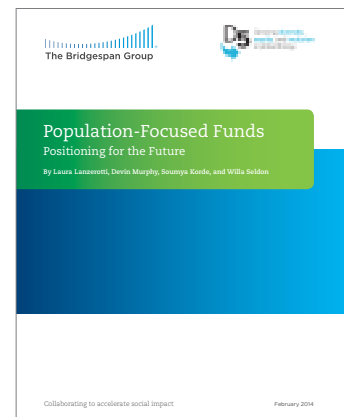
In March 2014, D5 released Population-Focused Funds: Positioning for the Future, one of philanthropy's most comprehensive studies of PFFs to date. The study, conducted by The Bridgespan Group, identifies strategies to increase the financial sustainability and impact of PFFs. Research included analysis of revenue data from more than 400 PFFs, focus groups and interviews of more than 65 professionals, and an online survey of PFFs. It identifies trends impacting the field, cross-cutting lessons, and examples of successful models and approaches.

### SHOWCASING DIVERSE DONORS: "WE ARE PHILANTHROPY" FILMS

"I Am a Philanthropist: New Voices in Giving" is a short film that D5 released in 2011 to raise the visibility of diverse donors and to encourage a rich variety of voices and perspectives in philanthropy. During 2013, D5 re-edited the film into two versions tailored to specific diverse communities: "We Are Philanthropy: African American Voices in Giving" and "We Are Philanthropy: LGBT Voices in Giving." These videos are a resource for a wide range of organizations within philanthropy to tee up discussions about specific communities.

### DIVERSE DONORS PRESENTATIONS

D5 also continues to make presentations about diverse donors, including the session "It's Later Than You Think: Get in Front of the Next Wave of Donors" at the September 2013 Council on Foundations Community Foundations Conference and a presentation of the original "I Am a Philanthropist" film at the Johnson Center's National Summit on Family Philanthropy in June 2013.



*D5's report on population-focused funds is one of the most comprehensive to date.*



*In 2013, the "I Am a Philanthropist" short film was expanded into two tailored versions for African American and LGBT philanthropists.*

# DATA

## GATHERING INSIGHTS & DEVELOPING COLLECTION STANDARDS

### INSIGHTS ON DIVERSITY: THREE COMMISSIONED RESEARCH PROJECTS

D5 commissioned a series of research projects to explore career opportunities and barriers facing people of color in philanthropy, to empower foundation leaders to take on diversity, equity, and inclusion, and to facilitate interactions between foundations and their grantee partners that result in advancements around diversity, equity, and inclusion practices. The issues these studies tackled are:

#### STUDY 1

##### **Vision and Voice: The Role of Leadership and Dialogue in Advancing Diversity, Equity, and Inclusion**

*Released April 2014*

Philanthropy Northwest, in partnership with the Seattle University Nonprofit Leadership Program, explored the role of leadership in advancing diversity, equity, and inclusion in philanthropy. The participatory research project engaged high-level executives in a peer learning network, and studied additional foundations to identify the practices, barriers, and organizational cultures that support diversity, equity, and inclusion.

#### STUDY 2

##### **Philanthropic Paths: An Exploratory Study of the Career Pathways of Professionals of Color in Philanthropy**

*Released May 2014*

This study conducted by Forward Change provides a holistic, in-depth picture of the career experiences of 43 philanthropic professionals of color ranging from Program Officers to CEOs working in a diverse array of foundations. The study surfaced a set of potentially common points of entry, career pathways and obstacles of professionals of color in philanthropy, as well as the factors that helped shape those pathways.

#### STUDY 3

##### **Influencing Diversity, Equity, and Inclusion in Practice: The Interactive Factors between Philanthropy and Nonprofit Organizations**

*Released May 2014*

OMG Center for Collaborative Learning examined how foundation and nonprofit partner activities intersect to broaden diversity, equity, and inclusion in grantee practices. The project identified where there are opportunities for foundations to reinforce diversity, equity, and inclusion through interactions with their nonprofit partners and peer foundations.

Public Interest Projects hosted five interactive webinars, two of which featured the authors of the first two studies. Roughly 50 individuals and organizations—reflecting a wide range of foundations, infrastructure groups, philanthropic advisors, and others—attended each webinar.

### DATA COLLECTION AND TRANSPARENCY

Work progresses on the effort to build field-wide standards for data collection and transparency.

- In spring 2013, the Foundation Center and the Donors Forum of Illinois launched a pilot of the Foundation Center's online profile tool designed to facilitate the way foundations update and share information about themselves and their grantmaking.
- D5 hosted a convening in December 2013 to discuss a data collection template developed by Marga, Inc. and the Foundation Center to learn from data pilots in Oregon and Indiana, and to develop strategies achieving standardized data collection and sharing in the field.
- The synthesis of existing standardized templates for data collection began in early 2014.
- D5 conducted extensive research and partnership development with a range of stakeholders to identify opportunities for addressing the technical and coordination barriers to achieving standardized data collection.

# LESSONS LEARNED

Reaching its midpoint in 2013 has provided D5 an opportunity to reflect on its work since 2011 and the possibilities to advance DEI in its remaining two years.

- **D5's work is moving from development to action.**  
D5's work through 2013 to develop the tools and framework for action—including resource scans, message development, collaboration building, and research—requires intense labor that takes time. But the time required to lay the groundwork will pay off with stronger action in future years.
- **To advance the work, we must answer key strategic questions.**  
In 2014, D5 will transition from the slow, hard movement-building work to advancing the best points of leverage. Key questions include which products will be the most useful building blocks? Which individuals and organizations can champion the most effective action? Where? How do strategies need to evolve and change? The tools in the “Take Action” section provide some of the answers.
- **A regional strategy is an effective and powerful mechanism for advancing DEI.**  
Before 2013, D5's work had mainly occurred at the national level. However, most philanthropy tends to operate on the regional level. So D5 spent 2013 crafting a regional strategy that leverages established networks within a given geographic region. This allows the work to be more fluid according to the needs of a region and strengthens efforts of foundations and individuals in the region to make the work their own.
- **How will the work continue beyond 2015?**  
Regardless of the amount of progress during D5's final two years, more work will remain. D5 is already forming plans for continuing the work beyond 2015. This includes advancing the regional strategy, learning about what works, and highlighting the movement of foundations, organizations, and individuals—rather than any single organization—who will, together, carry on the work beyond 2015.

# TAKE5

While vital to reflect on lessons learned on how to do this work better, it's critical to keep our focus on taking action. To help you and others act in support of this important cause, we've launched the Take 5 Campaign. The goal is ambitious, but achievable: 500 actions by the end of 2015.

Take 5 builds on the momentum to advance diversity, equity, and inclusion in the field by expanding the movement to more foundations. The plan is to inspire at least 100 people to take 5 actions that:

- Advance DEI within their own foundations or the field at large or
- Convince leaders of other foundations to take action on DEI

People who commit to Take 5 are Champions. Anyone can become one. You just have to be willing to take action, even if you don't know how to start or which actions might be best. There are plenty of tools and guidance to help you get started.

## Directory of Resources

Regardless of whether you commit to the Take 5 Campaign, you can access a growing library of tools and resources through the D5 website to achieve greater impact in your DEI work.

### Analysis of Policies, Practices, and Programs for Advancing Diversity, Equity, and Inclusion

Completed in fall 2013, this analysis (more details on page 18) produced one of the most comprehensive scans of written and web-based DEI resources in the field. From the scan, D5 produced an interactive resource guide that provides quick access to tools, programs, and models for DEI work. The guide organizes the resources into four essential tasks:

1. Make the case that DEI is important
2. Write DEI into your policies
3. Implement strong DEI practice into your programs and your operations
4. Monitor your work to ensure accountability

The full report and executive summary also provide a narrative analysis of the resources and their significance to DEI work.

### Communications Tools

Working with Hattaway Communications, D5 conducted extensive research to produce tools to communicate about DEI.

- Message Manual for the Field: Developed from audience research and marketing best practices, the manual provides language that can serve as a reference or template for creating messages that persuade and motivate people to act on DEI.
- Take 5 for D5: A conversation guide for the Take 5 Campaign helps participants structure interactions with colleagues and others.

### DEI Self Assessment

Foundations can take an assessment tool online to quickly capture their current DEI situation, spark dialogue, and identify tangible action steps.

### Tools and Knowledge from the Field

An online database provides a searchable interface with a DEI clearinghouse of toolkits, data, case studies, and other resources created by and for leaders in the field.

### Share Your Stories

Another helpful means of taking action on DEI is to share your stories of successes, challenges, and inspiration. It's as simple as contacting D5.

## ACTIONS AND TOOLS

Take 5 promotes six general types of actions and provides tools that support them, all of which can be found on the D5 website, [D5coalition.org](https://www.d5coalition.org).

### Starting the conversation

**FOR EXAMPLE**

Meet with a colleague within your own foundation or at another foundation to discuss ways to advance DEI

**SAMPLE TOOL**

Getting Comfortable with Conflict: Strategic Conversations at the Kalamazoo Community Foundation—by the Council of Michigan Foundations

### Changing policies and practices

**FOR EXAMPLE**

Conduct a DEI audit and set goals based on the results

**SAMPLE TOOL**

Racial Equity Resource Guide—by the W.K. Kellogg Foundation

### Data collection

**FOR EXAMPLE**

Improve your DEI data collection and be transparent about the results

**SAMPLE TOOL**

Developing Standards for the Collection of Data on Diversity in Philanthropy—by the Foundation Center

### Shift in grantmaking

**FOR EXAMPLE**

Make a grant to support the work of an organization working to advance DEI

**SAMPLE TOOL**

Grantmaking with a Racial Equity Lens—by GrantCraft

### Sharing the story

**FOR EXAMPLE**

Make your commitment to DEI explicit in your mission and external communications

**SAMPLE TOOL**

How Are Foundations Communicating Their Work on Diversity?—by the Diversity in Philanthropy Project

### Funding

**FOR EXAMPLE**

Create or contribute to a population-focused fund (PFF)

**SAMPLE TOOL**

Toolkit for Racial, Ethnic and Tribal Funds and Foundations—by the Forum of Regional Associations of Grantmakers



TAKE<sup>5</sup>  
action

## GET INVOLVED

To learn more about Take 5 or to sign up, visit the Take 5 section of the D5 website.

You can also feel free to develop your own actions by listing your ideas when you sign up to take action.

# THE PATH FORWARD: PRIORITIES FOR 2014

At the heart of D5's work has been support for foundations and other partners that seek to advance DEI. That purpose will continue with even deeper intensity as D5 reaches its fifth year and puts a laser-like focus on catalyzing action. We will continue to provide support for local, regional, and national efforts to advance DEI with communications tools and training; research, case studies and resources; connections to partners with expertise in implementation of aspects of DEI; and connections to peers engaged in similar work.

While we have set a clear path forward, we know that the work will not be linear, nor will it ever be complete. But by articulating a framework and priorities for the coming months, we are optimistic about the prospects for real and tangible progress. **Together, we are making philanthropy stronger.**

## Take 5 Campaign

The Take 5 Campaign will continue to be the organizing principle and yardstick for progress for D5's work as we intensify efforts to move foundations to take action. With the tools and resources already developed and with support provided by D5 and partners, Take 5 is a key way in which D5 will help mobilize champions to act within their own institutions and the field—and inspire their peers to do the same.

## Data Collection

Development and implementation of field-wide standards for data collection and transparency is a top priority for D5 in 2014. Data collection templates are in the final draft stages of development and will be piloted. We are increasing the number of stakeholders around the table, thereby expanding the breadth of competencies, resources, and institutions engaged in and committed to this collaborative work.

## Diverse Leaders

Executive leadership work—or increasing the number of diverse CEOs and trustees—has been a challenge for D5. Effective strategies for advancing this goal have been elusive, but the path forward is emerging. The research commissioned by D5 on career pathways of people of color in philanthropy as well as critical conversations with CEOs, trustees, foundation human resources departments and executive search professionals, have confirmed the importance of organizational culture and readiness in attracting and retaining diverse leadership. D5's work in 2014 will develop and execute strategies that build on this learning as we engage leaders to take an increasingly prominent role in advancing this work.



## Endnotes

1. For more perspectives on defining diversity, see *Proceedings from the Researcher/Practitioner Forum on the State of Research on Diversity in Philanthropy*, Association for Research on Nonprofit Organizations and Voluntary Action, Council on Foundations, and Foundation Center, 2007.
2. National Academy of Program Administrators, freedictionary.com.
3. *Benchmarking Diversity: A First Look at New York City Foundations and Nonprofits*, Foundation Center, 2009.
4. Loyd, Denise Lewin, Cynthia S. Wang, Katherine W. Phillips, and Robert B. Lount Jr. "Social Category Diversity Promotes Pre-meeting Elaboration: The Role of Relationship Focus." *Organization Science* 24, No.3 (2013): 757-772.
5. "Analysis of Policies, Practices, and Programs for Advancing Diversity, Equity and Inclusion," 22-23; see also Carbado & Gulati, "Acting White? Rethinking Race in Post-Racial America."
6. "Equity Advancing Equity," 8.
7. "State of the Work" 2013, 4.
8. "The Greater Wealth Transfer," 1. In Los Angeles County, California alone, more than \$114 billion in intergenerational wealth transfer will occur by 2020. "The Future of Philanthropy in Los Angeles," 4.
9. Interview with Emmett Carson, Silicon Valley Community Foundation.
10. "Moving Diversity Up the Agenda," 91.
11. "Transformative Organizations: Towards a Liberation of the Self and Society," 6.
12. "Transactions, Transformations, and Translations," 30.
13. "Analysis of Policies, Practices, and Programs for Advancing Diversity, Equity and Inclusion," 11.
14. [implicit.harvard.edu/implicit/](http://implicit.harvard.edu/implicit/).
15. "Analysis of Policies, Practices, and Programs for Advancing Diversity, Equity and Inclusion," 22.
16. See "Solidarity Politics for Millennials: A Guide to Ending the Oppression Olympics."
17. This work is part of the Leadership in a Changing World Project housed at RCLA. See also: Schall, Ospina et al. 2004, 153.
18. Schall, Ospina et al. 2004, 154.
19. Elizabeth Cole, quoted in Hankivsky and Cormier 2009 "Intersectionality: Moving Women's Health Research Forward."
20. Schall, Ospina et al. 2004, 155; see also "Generative Mobilization: Appreciative Movements."
21. Colson Whitehead, "The Year of Living Postracially," *New York Times*, November 3, 2009, A31.
22. Legions of examples abound. Some important examples that we still feel the effects of are in minimum wage laws, social security and the G.I. Bill. This is discussed at [loomfoundation.org](http://loomfoundation.org). Ira Katznelson's *When Affirmative Action Was White: The Untold History of Racial Inequality in Twentieth-Century America* (New York: W.W. Norton & Co., 2005) nicely lays out a wide range of programs that benefited whites more than others.
23. Historians and cultural critics have produced hundreds of books about the interaction of race and class and the creation of whiteness. David R. Roediger, *The Wages of Whiteness: Race and the Making of the American Working Class* (New ed., New York: Verso, 2007) set the conversation's foundation. Ian Haney Lopez explores how the legal system helped enforce whiteness in *White by Law: The Legal Construction of Race* (New York: New York University Press, 1997). *His Dog Whistle Politics: How Coded Racial Appeals Have Reinvented Racism and Wrecked the Middle Class* (New York: Oxford University Press, 2014) illustrates how racist appeals in politics today have lost their florid edge and morphed into coded but still potent messages. John A. Powell, *Racing to Justice: Transforming Our Conceptions of Self and Other to Build an Inclusive Society* (Bloomington: Indiana University Press, 2012), avoiding the more class-grounded argument of Roediger, gives a thoughtful, approachable overview of whiteness and structural racism.
24. See the city of Seattle's equity toolkit at [www.seattle.gov/Documents/Departments/RSJI/RacialEquityToolkit\\_Introduction.pdf](http://www.seattle.gov/Documents/Departments/RSJI/RacialEquityToolkit_Introduction.pdf) and at the Race and Social Justice Initiative website, [www.seattle.gov/rsji](http://www.seattle.gov/rsji). The Annie E. Casey Foundation has also done some excellent work on equity filters with its Race Matters work. <http://www.aecf.org/KnowledgeCenter/PublicationsSeries/RaceMatters.aspx>.
25. Leaders can also draw on the field-tested work being done to align local governments on race and equity in the Local and Regional Government Alliance on Race & Equity, a new initiative led by John Powell and Julie Nelson, former head of Seattle's Office for Civil Rights and the Race & Social Justice Initiative.



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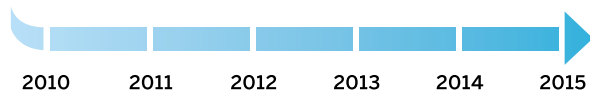
## EDITOR & DESIGNER

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## TARGETING BIG CHANGES

Our vision is that by 2015:

- 1. Leaders:** New foundation CEO, staff, and trustee appointments more closely reflect U.S. demographic trends.
- 2. Action:** More foundations take meaningful action to address diversity, equity, and inclusion issues in their organizations.
- 3. Funding:** Annual funding for diverse communities increases substantially.
- 4. Data:** Philanthropy has the research capacity to be more transparent about progress on diversity, equity, and inclusion.



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