

Diversity in Philanthropy Project COUNCIL ON FOUNDATIONS ANNUAL CONFERENCE BRIEFING

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Creating Sustainability

The Diversity in Philanthropy Project (DPP) is a voluntary, three-year effort of leading foundation trustees, senior staff and executives committed to increasing philanthropic effectiveness through increased investments in diversity, inclusion and social equity.

We believe that diversifying perspectives, talent and experience can help ensure philanthropy's continued leadership in a rapidly changing society. Building on

philanthropy's best traditions and aspirations, we're working together to develop a new, field-wide agenda for diversity.

DPP was created as a time-limited effort – a three-year (2007-2009) campaign to elevate dialogue and action on diversity and inclusion in philanthropy. From the start, we have been thinking about how our work can best support the field and build momentum for the next generation of work on diversity and inclusion.

The Council on Foundations (COF) annual conference has provided us with critical opportunities to engage field leaders in dialogue on the issues. The standing-room-only response in recent years has demonstrated the timeliness of the conversation. Both the 2007 and 2008 COF leadership convenings were heavily documented via written reports and video recordings that have been uploaded to the DPP Web site, making these widely accessible to the field beyond the 2,500 or so conference attendees. ■

DPP at 2009 COF Conference

This year, in our final COF annual conference appearance, DPP has collaborated with COF staff to convene **Diversity and Effectiveness in Philanthropy: A Leadership Exchange on Next Steps Opportunities for the Field** – a high-level panel discussion to be held on Monday, May 4 at 2:30pm in Atlanta.

Panel participants will include: Sterling K. Speirn, President and CEO, W.K. Kellogg Foundation (Michigan); Diane Kaplan, President and CEO, Rasmuson Foundation (Alaska); Carol A. Goss, President and CEO, Skillman Foundation (Michigan); and Aaron Dorfman, Executive Director, National

Committee for Responsive Philanthropy (Washington, DC). Theresa Fay-Bustillos, Trustee, Council on Foundations and Vice-Chair of COF's Inclusive Practices Committee, will serve as the panel moderator.

In this session, participants and panelists will explore diversity, effectiveness and the debate raging around these issues across our field. The goal is to move the conversation along to a new point of understanding – even if there is no consensus – and to identify opportunities to come together to meet remaining challenges. ■

“Our success in this work will result in better philanthropy, better social problem-solving and a better world.”

– Robert K. Ross, MD
Chair, Diversity in
Philanthropy Project, and
President and CEO,
The California Endowment

Our Strategy and Progress

Since its inception, DPP has concentrated its efforts in three strategic areas:

- 1) promotion of voluntary diversity and inclusion initiatives;
- 2) encouragement of a national system of data collection, analysis and accountability; and
- 3) support for the advancement, organization and distribution of related knowledge, tools and resources.

DPP has made significant progress in each of these areas over the last year.

1) Voluntary Initiatives

DPP Advisory and Executive Committee

DPP's impressive national advisory group of 35 foundation and philanthropic infrastructure executives represents organizations and networks committed to promoting voluntary philanthropic initiatives on diversity and inclusion. Thirteen of these advisors have also agreed to serve as executive committee members, providing in-depth guidance as DPP works to sustain and institutionalize its efforts across the field.

Creation of Common Principles and Promising Practices

Leading philanthropic research institutions have recently proposed a common finding: there appears to be greater diversity among foundations with organizational diversity policies and dedicated practices in place.¹

The DPP Advisory Board formulated its Common Principles and Promising Practices for leading foundations and philanthropic networks to endorse and apply in their respective institutional settings. In recent months, these instruments have been formally adopted by The California Endowment, the W.K. Kellogg Foundation, Rockefeller Philanthropy Advisors and regional associations including the Ohio Grantmakers Forum and the Council of Michigan Foundations, with new organizations signing on every day.

Voluntary Benchmarking Excellence Group

DPP's Benchmarking Excellence Group supports various field-wide benchmarking platforms to help foundations individually and collectively examine their comparative performance on diversity. The California Endowment and Rockefeller Brothers Fund are both conducting internal benchmarking efforts that may result in replicable assessment tools and yield important findings for the field. In addition, DPP consultants and advisors are currently exploring with the Center for Effective

Philanthropy and the Race and Equity in Philanthropy Group opportunities to infuse diversity measurements within existing field assessment instruments.

2) Data And Research

Data and Research Working Group

This year, the Foundation Center has assumed coordination of DPP's Working Group on Philanthropic Diversity Data and Research, and is expanding its membership to include practitioners and more regional representatives. The goal is to build a national chart of accounts and effective data collection mechanisms that will allow participating foundations to contribute to and benefit from more systematic diversity-related data collection across the field.

Regional Data and Field Performance Tracking Efforts

Northern California Grantmakers and the Foundation Center took the lead, with DPP's technical assistance, to complete an unprecedented study intended to test and refine the Berkeley, CA-based Greenlining Institute's recent controversial research concerning diversity performance among large private California foundations and their grantee institutions. Other grantmaker association leaders in New York, Michigan and the Pacific Northwest have initiated comparable efforts in their regions.

CEO Focus Groups

DPP's CEO Focus Groups deepen our understanding of what works to institutionalize diversity successfully and the key roles chief executives play in the process. Last year we collaborated with COF and Women & Philanthropy to facilitate W.K. Kellogg Foundation-sponsored regional CEO Focus Groups in Chicago and in Michigan. Successful CEO Focus Groups have also taken place this year in Los Angeles in collaboration with Southern California Grantmakers, and in Columbus in collaboration with Ohio Grantmakers Forum. More than 75 foundation CEOs have

participated in these discussions to date. We are currently working with the Minnesota Council on Foundations, Philanthropy New York and the Colorado Association of Funders to further develop and refine the CEO Focus Group model.

3) Knowledge, Tools And Resources

Council of Michigan Foundations (CMF) Partnership

CMF and DPP have partnered to develop new knowledge, tools and support for increasing diversity and inclusive practice among foundations in Michigan and the nation.

Symposium March 2-4, 2009

A primary element of this collaboration was to co-convene more than 75 Michigan and national philanthropy leaders at the Symposium on Diversity & Inclusion in Philanthropy: The Michigan Experience. The Symposium illuminated the strategies, cultural shifts, policies and practical steps that Michigan foundations are using to increase diversity and inclusive practice. It explored how increasing diversity and inclusive practice can bolster foundation effectiveness and accountability.

Luna Productions Documentary on CMF and the Michigan Experience

Berkeley, CA-based Luna Productions produced a video case study on CMF's evolving process to address diversity as a regional association, with DPP's support. The video tells the emerging story of how Michigan foundations – individually and collectively – are working to become more effective grantmaking institutions through increased diversity and inclusivity.

DPP Web Site & E-Newsletter

The DPP Web site offers a range of diversity resources including: case studies and reports of evolving lessons and perspectives; commissioned commentaries from leading philanthropy executives; links to various organizations that address, assess and advance diversity; and links to relevant articles, op-eds and legislative updates.

To date, DPP has produced 11 e-newsletters to inform the field of our efforts and share high-level thinking and writing about diversity and inclusion in our sector. Sign up to join the conversation at www.diversityinphilanthropy.org. ■

¹ e.g., see preliminary findings of Michigan Organized Philanthropy Demographic Survey, conducted Summer/Fall 2008, Johnson Center at Grand Valley State University; and Beyond Compliance: The Trustee Viewpoint on Effective Foundation Governance, November 2005, the Center for Effective Philanthropy.

DPP Transition

DPP is facilitating a field-wide planning process tentatively called D5 – five infrastructure networks/groups coming together to develop a five-year plan to strengthen diversity and effectiveness in the independent sector. During the months to come, we will be operationalizing individual and common agendas for D5’s work going forward, and we will explore ways to engage other key players in this effort. We aim to roll out our five-year plan no later than January 2010.

Joining in this unprecedented, forward-thinking approach to the work of expanding diversity, inclusion and equity in organized philanthropy are the Council on Foundations, the Foundation Center, a consortium of regional associations of grantmakers, a coalition of interested affinity organizations and Rockefeller Philanthropy Advisors (representing a select cohort of diversity-focused community funds serving women’s and girls’ constituencies, LGBT groups, communities of color and other historically underserved populations).

D5 Vision and Emerging Goals

We envision a philanthropic sector that promotes equal access to society’s resources for all – including the most vulnerable and historically disadvantaged – by carrying out all of its work in full awareness of the changing demographic realities of the communities we serve.

The D5 partners’ emerging goals will focus on specific areas where they want to see demonstrated impact. These are likely to include: efforts to expand institutional capacity-building and more strategic collaborations involving diverse groups and leaders; more widespread, collective attention to and support of effective diversity and inclusion practices in the field; and a deeper understanding of the still-untapped assets of diverse populations to impact tough systemic issues such as poverty, social inequities, health disparities and educational and economic disadvantages.

These emerging goals incorporate the notion that increased diversity can be both a strategic end as well as a means to address underlying issues in society caused by social, economic and political inequities. They also represent our comprehensive approach to strengthening diversity in philanthropy – one that tactically leverages change at both the institutional and sectoral levels while rigorously striving to demonstrate the social impact of diversity work.

Emerging D5 Strategic Areas of Focus

Where are the potential areas of synergy and what can be realistically accomplished toward these goals by the D5 partners in a five-year time period? Recent D5 partner discussions have identified these five areas where they see opportunities to focus strategically on collective deliverables and products to impact the field: 1) Data and Research; 2) Education, Tools and Training; 3) Leadership Development; 4) Diversity Funds Outreach and Cultivation; and 5) Public Policy/Advocacy. ■

- Alan J. Abramson**
Senior Fellow, Program on Philanthropy and Social Innovation, The Aspen Institute
- Elizabeth T. Boris**
Director, UI Center on Nonprofits and Philanthropy, Urban Institute
- Reneé B. Branch**
Director, Diversity and Inclusive Practices, Council on Foundations
- Mary Ellen Capek**
Principal, Capek & Associates
- Michael Cortés**
Independent Researcher/Consultant
- Aaron Dorfman**
Executive Director, National Committee for Responsive Philanthropy
- Barry Gaberman**
Chair Emeritus, Worldwide Initiatives for Grantmaker Support (WINGS)
- Lisa R. Jackson**
Vice President, Research, Center for Effective Philanthropy
- Nadine T. Jalandoni**
Director, Research Services, Independent Sector
- Thomas G. Jeavons**
Executive Director, ARNOVA
- Judith Kroll**
Director of Research, Council on Foundations
- Steven Lawrence**
Senior Director for Research, The Foundation Center
- Kien S. Lee**
Principal Associate, Community Science
- Lawrence T. McGill**
Senior Vice President for Research, Foundation Center
- Ricardo A. Millett**
Independent Consultant/Researcher
- Scott Nielsen**
Principal, Alexander Nielson Consulting
- Michael Omi**
Department of Ethnic Studies, Associate Professor, University of California, Berkeley
- Joel J. Orosz**
Professor of Philanthropic Studies, Grand Valley State University
- Kenneth Prewitt**
Professor of Public Affairs, Columbia University School of International & Public Affairs
- Henry A. J. Ramos**
Principal, Mauer Kunst Consulting



“We believe in diversity because it is an expression of America’s best ideals.”

– Susan V. Berresford
Trustee, United States Artists Foundation

Advisory Board and Executive Committee Members

Robert K. Ross, MD (Chair and ECM)
President and CEO, The California Endowment

Susan Batten (ECM)
President, Association of Black Foundation Executives (ABFE)

Ronna D. Brown (ECM)
President, New York Regional Association of Grantmakers

Jessica Chao (ECM)
Vice President, Rockefeller Philanthropy Advisors

Rob Collier
President and CEO, Council of Michigan Foundations

Victor De Luca
President and CEO, The Jessie Smith Noyes Foundation

Louis Delgado
Trustee, Needmor Fund

Linetta Gilbert
Senior Program Officer, The Ford Foundation

Steve Gunderson (ECM)
President, Council on Foundations

Stephen B. Heintz (Vice Chair and ECM)
President and CEO, Rockefeller Brothers Fund

Sandra R. Hernández, MD (ECM)
President and CEO, The San Francisco Foundation

Gara LaMarche (ECM)
President and CEO, The Atlantic Philanthropies

Thomas C. Layton
President and CEO, Wallace Alexander Gerbode Foundation

Carol Lewis
President and CEO, Philanthropy Northwest

Valerie S. Lies (ECM)
President and CEO, Donors Forum of Chicago

Terry Mazany
President and CEO, Chicago Community Trust

Lawrence McGill (ECM)
Senior Vice President for Research, Foundation Center

Hugo Morales
Trustee, Rosenberg Foundation

John Morning
Trustee, Charles Stewart Mott Foundation

Gabriella Morris
President, Prudential Foundation

Gary D. Nelson, Ph.D.
President and CEO, Healthcare Georgia Foundation

Peter H. Pennekamp
Executive Director, Humboldt Area Foundation

Debra J. Pérez, Ph.D.
Senior Program Officer, Robert Wood Johnson Foundation

Linda E. Reed
Executive Director, Montana Community Foundation

Deborah J. Richardson
Chief Program Officer, Women's Funding Network

Michael S. Seltzer
Board Member, Forum of Regional Associations of Grantmakers

Ruth Shack
President and CEO, Dade Community Foundation

Unmi Song
President and CEO, Lloyd A. Fry Foundation

Sterling Speirn (Vice Chair and ECM)
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Arturo Vargas
Trustee, Council on Foundations

Luz Vega-Marquis
President and CEO, Marguerite Casey Foundation

Cole Wilbur (ECM)
Trustee, David and Lucile Packard Foundation

Richard Woo (ECM)
CEO, Russell Family Foundation

Join Us

We invite you to join our community of practice and work with us to achieve the full depth and breadth of the many possibilities before us.

Join us by investing your institution's financial and intellectual capital and by encouraging your colleagues and allies across the field to be a part of D5 as well.

Other ways to engage:

Inform

- Sign up for our e-newsletter
- Learn more about our voluntary diversity initiatives
- Watch our documentary, *The Michigan Experience*

Involve

- Sign on to our Principles and Practices – Let us know the extent to which our Principles and Practices resonate with your organizations or with you as individual field leaders.
- Join the D5 effort as it unfolds – We welcome potential partners and funders interested in learning more and becoming involved.

Inspire

If you'd like to share your stories, or just learn more about what other field leaders are doing ...

- Join our Benchmarking Excellence Group
- Attend a CEO Focus Group
- Share what you learn with your networks

Contact us at info@diversityinphilanthropy.org or visit www.diversityinphilanthropy.org to find out more. Thank you!

"It is inarguable that philanthropy has far to go to in dealing with the appalling inequalities in American society, and the structures of exclusion that have produced, perpetuated and exacerbated these divisions. We need all the help we can get to move us to a better and more effective place."

– Gara LaMarche
President and CEO,
The Atlantic Philanthropies

Diversity
Philanthropy

www.diversityinphilanthropy.org