

Walking the Talk of

Diversity, Equity, Inclusion from Inside

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- **Share:**
 - How an **organizational audit** can increase **accountability** to a **vision of DEI**.
 - an **institutional framework** for DEI learning.
- **Discuss** how to **engage staff** in using DEI audit results
- **Address** challenges
- **Understand** the national **landscape**.



Agenda

2:15 Introductions

**2:30 An Institutional
Framework for
Learning &
Accountability to
Diversity, Equity &
Inclusion (DEI)**

**2:35 The Story of TCE's
Journey**

**2:50 Fishbowl: National D5
Director, Foundation,
Evaluation Perspectives**

3:20 Closing Activity



1. Type of Foundation

- a) Community Foundation
- b) Family Foundation
- c) National Foundation
- d) Statewide Foundation

2. Experience with DEI

- a) Vision Statement of DEI
- b) Workplan /Goals for DEI



Agreements

- Assume good intentions.
- Be willing to be uncomfortable.
- Check for assumptions.
- Commit to not blaming or attacking.
- Be aware of own privilege & positional power
- Take responsibility for sharing back, while honoring confidentiality.
- Have fun!



1. Why are you **interested** in the topic of DEI? What are your **burning questions**?
2. What is your **organization's readiness** to have conversations about diversity, equity and inclusion?




Distinctions Among Diversity, Inclusion & Equity



Diversity of people, perspectives



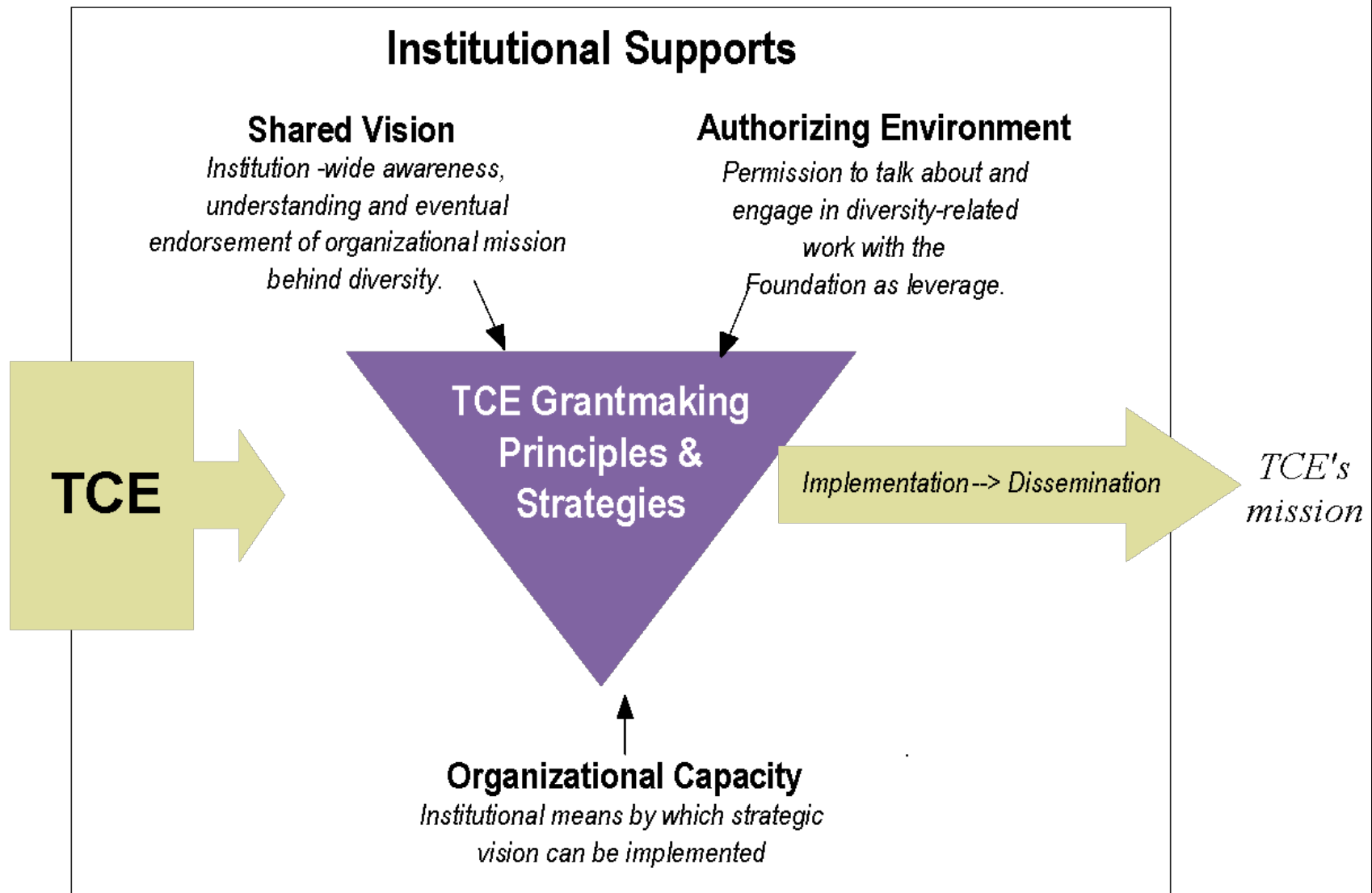
Inclusion = power, voice, organizational culture



Equity = results from policy, practice, position



Institutional Framework for Learning & Accountability



The Story of TCE's Journey



Voice



Our Big Bang



Diversity Audit Summary

	Progress			
	No	Some	Good	Excellent
Diversity Plan Goals [Diversity Goals have been reorganized by major categories.]				
Shared Vision				
1. Adopt and publicly disseminate a clear diversity statement.	██████████			
Authorizing Environment				
2. Engage Board of Directors in endorsing an organizational Diversity Plan.	██████████			
3. Include diversity measures in the performance goals for the CEO and other managers.	██████████			
Organizational Capacity				
4. Review and make changes to personnel policies and procedures to ensure compliance with all relevant laws and regulations on employment nondiscrimination and employee benefits.	██████████			
5. Identify & implement a plan for additional staff oriented to diversity issues.	██████████			
6. Ensure compliance with accessibility requirements for facilities and programs.	██████████			
8. Conduct proactive outreach and recruitment efforts to attract diverse management and staff positions.	██████████			
12. Review and make changes to procurement policies to ensure diversity in contracting.	██████████			
13. Explore, review and consider ways to increase diversity and diversity among investment managers.	██████████			
Data Tracking, Analysis, and Reporting				
7. Develop and adopt diversity indicators for management and staff; collect baseline data; implement a publicly report.	██████████			
9. Continue collecting and documenting diversity-related information about applicants and grants, especially populations/communities served.	██████████			
10. Share information about grantmaking with philanthropy affinity groups upon request.	██████████			
Strategic Grantmaking Focus on Diversity				
Develop a strategic grantmaking focus on diverse communities and address themes of diversity, inclusion, social justice and equity.	██████████			
Philanthropic Leadership				
11. Collaborate with philanthropy peers to develop and implement standardized diversity indicators for applicant/grantee organizations.	██████████			
14. Evaluate and disseminate best practices regarding increasing diversity in philanthropy.	██████████			
15. Support adoption of best practices by peer foundations.	██████████			

ACCOUNTABILITY

Laying the Foundation

Building Collective Leadership



The Diversity Audit Contributes to Organizational Learning

Learning Areas

Components

Building Healthy Communities

What is TCE learning across Campaigns and BHC sites?

- TCE Goals
- Cross Site Learning System
- Strategic Review
- Campaign Level Evaluations

Organizational Learning

What can TCE learn about how we function so that we can make improvements?

- Diversity Audit
- Center for Effective Philanthropy Surveys

TCE's Commitment to DEI

- Definition includes **race, ethnicity, age, gender, sexual orientation, disability, and geographic diversity.**
- Essential to **organizational effectiveness and excellence**, and that services are enhanced when **organizations are reflective of communities being served.**
- Our commitment to diversity is **reflected in the composition of our staff, management, and Board of Directors, using diverse vendors, contractors and consultants, and promoting equal opportunity through our business transactions.**
- Committed to **discuss issues related to diversity and inclusion with grantees and applicants.**
- **Data related to governance, management, staff composition and asked of grant applicants, as appropriate .**
- TCE participate in and support efforts of peer funders to increase diversity and inclusion in the **field of philanthropy.**

The Diversity Audit consists of:

Done

- Staff & Board Demographic Survey

Done

- Staff & Board Benchmarking Survey:

Done

- Staff Interviews

Done

- Demographic Surveys of Partners

Done

- Document Review

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Authorizing Environment				
2. Engage Board of Directors in endorsing an organizational Diversity Plan.				
→ 3. Include diversity measures in the performance goals for the CEO and other managers.				
Organizational Capacity				
4. Review and make changes to personnel policies and procedures to ensure compliance with all relevant laws and regulations on employment nondiscrimination and employee benefits.				
→ 5. Identify & implement a plan for additional staff orientation and training on racial equity issues.				
6. Ensure compliance with accessibility requirements of ADA & promote language access.				
● 8. Conduct proactive outreach and recruitment for diverse candidates for Board, management and staff positions.				
12. Review and make changes to contracting policies and promote diversity in contracting.				
● 13. Explore, review and consider socially responsible investments and diversity among investment managers.				
Data Tracking, Analysis, and Reporting				
● 7. Develop and adopt diversity indicators for Board, management and staff; collect baseline data; implement a publicly report.				
→ 9. Continue collecting and documenting diversity-related information about applicants and grants, especially populations/communities served.				
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Areas of Strength

“Diversity is an on-going point of discussion at the Board level. I also appreciate the goal to influence philanthropy by setting the standard.”

- Board member

- Strength in Board and staff diversity
- Staff experience a highly authorizing environment
- Approach to diversity reflect complexity & nuanced understanding
- Increased diversity among investment managers and social responsible investing
- More robust data collection tools
- Strong grantmaking focused on communities, equity, and disparities
- Visible & committed philanthropic leadership

Challenges



Areas Requiring Attention

“There are a handful of [questions] among 60 performance goals. But DEI as a performance factor, does not weigh that high.

There is an assumption at TCE that we work on these and do well compared to other foundations, [but] I wouldn't say it is as explicit as it could be.”

- Executive Leader

- Elements of Diversity Vision and Plan out of date and not widely known
- Staff desire more training and deeper dialogue about diversity.
- Diversity effort much more diffused, thus, accountability mechanisms can be clearer
- Data collection processes and analysis need attention
- More focus on LGBTQ, Latinos, disability, gender diversity

Implications for Action

Clarify

- Management of diffused diversity efforts
 - Performance measures
-

Continued Development

- Refresh the Diversity Plan and share along with diversity vision across staff
 - Sustain diversity discussions and training throughout TCE
 - Improve data collection practices
-

Excel

- Engage in critical examination, annually
 - ✓ Staff and Board diversity data to decide if action is needed
 - ✓ Grantmaking: LGBTQ funding and investment in minority led organizations

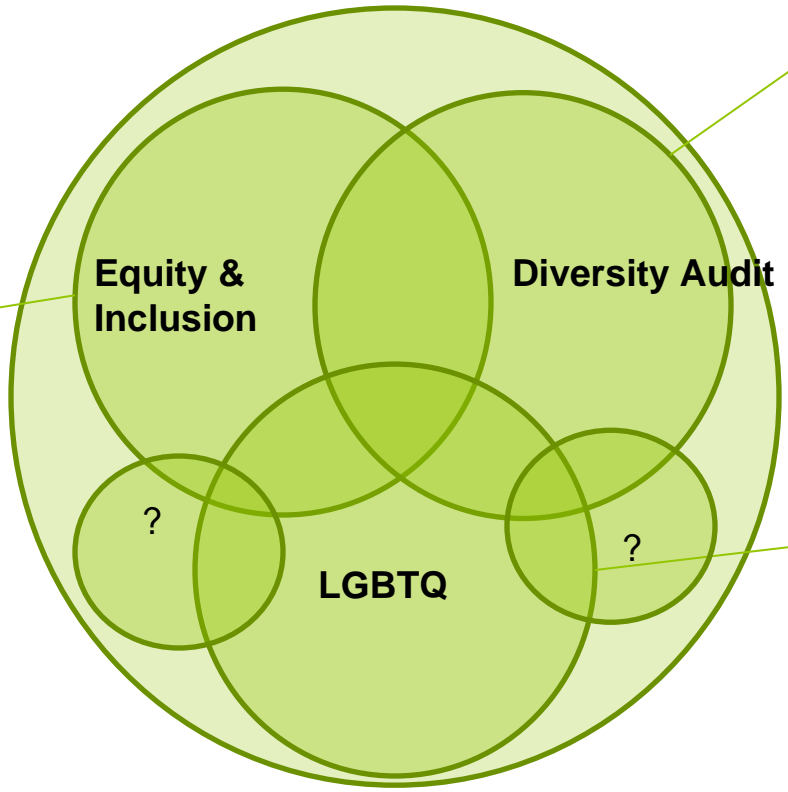
Next Steps

Activity	Timeframe
Finalize draft report	July
Deliver final report to Board	August Board Meeting
Diversity Workgroup meeting to discuss recommended changes to Diversity Plan	Late Summer
Executive Team review recommended changes to the Diversity Plan	Fall
Share results with staff and partners in the field	Late Fall
Start action planning -Data Use -Training	Winter



Intersection: Creating space for DEI discussions, improved organizational learning and operations, and trainings

Support TCE-wide efforts to integrate the values of equity, inclusion, and diversity in all policies, practices, processes, organizational culture, and other systemic levels



Review findings, create, and implement an action plan in response to the Diversity Audit.

Create a supportive environment where the inclusion of LGBTQ issues and populations are understood as integral to the foundation's goals and work, that maximizes existing strengths within The Endowment, and provides time and space to build staff capacity and knowledge.

Our Evolution Continues







Imagine philanthropy...

- **achieves lasting impact** by drawing on the power of diverse staffs and boards
- **forges genuine partnerships** with diverse communities
- **increases access** to opportunities and resources

for all people.

Four Big Goals



1. Recruit diverse **leaders** for foundations—including CEOs, staff, and trustees



2. Increase **funding** for diverse communities and ensure that foundations offer all constituencies equal opportunity to access the resources they need



3. Improve **data** collection and transparency so we can measure progress



4. Identify the best **actions** we can take in our organizations to advance diversity, equity, and inclusion

Postcard to Self

- 1. One or two key lessons I am taking away from today's session.**
- 2. How I will apply what I've learned in my work and organization moving forward.**

