



2013 **DIVERSITY**
INCLUSION
SUMMIT



A PROGRAM OF THE AFP FOUNDATION FOR PHILANTHROPY - CANADA & THE AFP FOUNDATION FOR PHILANTHROPY
CO-CONVENED BY AFP, D5 COALITION AND THE JOINT AFFINITY GROUP (JAG)

OUR PURPOSE:

“to gather leaders from diverse fundraising or philanthropic associations to share ideas and develop a strategy for collective action leading to greater inclusiveness in fundraising and philanthropy”



SUMMIT AGENDA

- 1** How can the Association of Fundraising Professionals and other fundraising professional groups assure that the fundraising profession and their memberships reflect all of the diversity and richness in the communities that they serve?
- 2** What can the fundraising community do to assure that all who want to be a part of the profession feel welcome and engaged?
- 3** How can the entire philanthropic community feed the pipeline of future fundraising professionals to assure that the profession continually strives to reflect the communities they serve and welcomes all who want to be a part of the profession?

SETTING THE LANDSCAPE

The facilitator for the Summit, Janice Gow Pettey, presented an opening story illustrating the challenges and unintended consequences which can arise from faulty assumptions influencing approaches to diversity.



This story reflects a common situation. There are insiders (giraffes) and outsiders (elephants). The insiders may genuinely want an equal partnership and value the other group. However, baseline assumptions can be effective blinders that prevent them from seeing solutions outside their own norms. The outsiders also have their own assumptions about how things should be. So, while tension may be inherent in situations like this, they need not lead to disaster. Tension can be part of the process leading to a creative solution.

Embracing diversity means having a genuine respect for differing perspectives, so that solutions encompass all diverse views and needs. Diversity increases the wealth of knowledge and ideas available, as long as they all look for creative and mutually satisfactory solutions. The expectation of one side conforming is likely to create confusion and hostility.



IDENTIFYING ISSUES

Participants were asked to discuss the issues we face as we try to implement diversity/inclusion in our organizations. Comments are grouped into the broad themes outlined below:

BECOMING CULTURALLY AWARE

The first step in understanding another's culture is to be aware of our own cultural heritage, and the best way to learn about a different culture is to ask questions – learn about individuals' hopes, fears, and values.

Asking questions is good, as long as we don't offend in doing so. And, we should be honest about why we are asking. It would be dangerous to assume that one person from a community can speak for the entire community. "What do you want to be called?" might have a different answer depending on which member of the community is asked.

Being donor-centric - this universal principle of fundraising applies to cultural awareness: Don't lecture potential donors about what your organization can do with their contributions. Instead, learn as much as possible about their aspirations and work to help them achieve their philanthropic goals.

BEING AGENTS OF CULTURAL CHANGE IN OUR ORGANIZATIONS

In addition to becoming more culturally aware, we must think about what we are willing to change in our organizational culture to make them more inclusive.

Considerations include:

- 1 What value does diversity bring to our organizations? Inclusion of multiple perspectives can make our nonprofits' outcomes stronger.
- 2 Are there "insiders" and "outsiders" in our organizational culture? How can we break out of this mold? Where are we on the continuum of engagement with individuals from diverse backgrounds? How can we reconcile the twin goals of identifying ways in which we are different with being more inclusive?
- 3 Are the leaders of our organization committed to inclusion?
- 4 Have we framed goals for inclusion in our organization? Are we able to measure progress/outcomes?
- 5 How can we develop commonly accepted language around the concepts of philanthropy and fundraising? In some countries, for example, the word fundraising is not politically correct; resource development is a more culturally acceptable term.
- 6 In hiring fundraisers, it is more important to find individuals who can develop good relationships with potential donors than trying to match a fundraiser's ethnic background with the ethnic background of donor prospects.
- 7 In recruiting board members we should think beyond mere representation of different cultures. If we want to find an individual of color to serve on our board, we should say so, but at the same time talk about other qualities we're seeking that the individual fulfills.

WELCOMING PEOPLE FROM DIVERSE BACKGROUNDS INTO THE FUNDRAISING PROFESSION

There is currently a lack of diversity in the fundraising profession pipeline, and glass ceilings seem to exist within the profession for individuals from diverse backgrounds.

Considerations include:

- 1 What is the value proposition for those we are trying to attract into the profession? How are we communicating this to individuals considering a career in fundraising?
- 2 How can we tap into networks of diverse communities and encourage them to consider fundraising careers?
- 3 Involving diverse individuals in committees and volunteer opportunities in our organizations as a pipeline to staff and/or board positions.
- 4 There should be a concerted effort to hire people from diverse backgrounds at the entry level and to mentor them as they progress to higher levels of responsibility.
- 5 Metrics about needed skill sets for success in fundraising should be developed and communicated to individuals considering a fundraising career.
- 6 Youth in Philanthropy materials developed by AFP and other organizations can be used to teach children about fundraising careers. The AFP Houston Chapter is using these materials to teach inner city youth about fundraising.
- 7 AFP Collegiate Chapters can help college students learn about fundraising as a career.

IMPROVING PRACTICE THROUGH RESEARCH AND EDUCATION

Research data can demonstrate to the nonprofit sector the value of hiring a diverse fundraising team. Taking an evidence-based approach will help affirm why diversity and inclusion are important.

Every region and culture has unique gifts to contribute. Some extraordinary approaches to raising funds are being employed in countries and communities around the world, but are not reflected in the traditional AFP programs. We need to consider changing the way we do business and developing different program and product strategies to include these non-traditional approaches.

Ideas/Solutions Generation

Participants were asked to brainstorm at their tables on six broad topics related to diversity and inclusiveness:

- 1** Research
- 2** Staffing, operations/administration
- 3** Governance
- 4** Education/professional development
- 5** Terminology/definitions
- 6** Marketing/communications

Within each category, the groups produced a discussion report (with additions from the entire group) including the top two focus or functional areas the group discussed, potential barriers to achieving the topic area, and budgetary implications to consider.



1

RESEARCH

Functional Areas:

- A need for a clear definition of the issue. Is it local, regional, national, etc.?
- What are the tools and partnerships we need?

Potential Barriers:

- Funding – what is the Return on Investment?
- Collaboration

Budgetary Impact:

- Who will pay – how can they justify the investment?



ACTION PLAN:

- Partner with other organizations to define parameters, develop research questions and methodology. Lilly Family School of Philanthropy, D5 Coalition, and JAG would be places to start.
- Work with the AFP Foundation for Philanthropy to find funding for the research.

2

STAFFING/OPERATIONS/ ADMINISTRATION

Functional Areas:

- Engagement - Professional development and raising awareness organization-wide.
- Building an environment where people want to work, educating staff about what you do.
- Recruiting: being comfortable with those around you: age, race, values, and level of support for being successful.
- Recruitment and retention
- Going beyond surface – level opportunities for inclusion to pursue the inherent value of being intentionally inclusive across the organization from human resources to leadership.
- Being clear about goals/outcomes of becoming more inclusive and having ways to measure and evaluate

Potential Barriers:

- Change is hard.
- Budget – costs/impact, effect on donors
- Organizational buy-in – support from leadership

Budgetary Impact:

- Professional Development.
- Considering this important enough to risk losing donors to open up to the possibility of bringing old donors along and tapping new donor prospects.
- Understanding that long-term investment overcomes short-term losses



ACTION PLAN:

- Learn what the other organizations are doing and ask for their recommendations on diversity/inclusion initiatives. How can we collaborate with other entities?
- Develop education around the benefits of diversifying fundraising staff and how to recruit and retain diverse staff.
- Develop resources on goal setting and metrics to measure success in inclusiveness initiatives.
- Develop resources that lead to HR recruitment.

3

GOVERNANCE

Functional Areas:

- Diversity positively impacts governance. Different perspectives are represented. We're encouraged to think about others.
- Better governance affects the nonprofits success. "Privilege of the dominant group – we don't have to think about it".
- Reconcile (organizational?) need with lack of community diversity in order to satisfy board document relating to diversity and/or funders.
- Definition of philanthropy to be reflective of community understanding.
- Profiles/filters required during hiring/recruiting both managers and board.

Potential Barriers:

- Token representatives on the board. Not real inclusiveness. Culture isn't conducive to sharing their ideas – it isn't really valued.
- Commit to the work. We understand the benefits of diversity, but are we really committed to doing the work to achieve diversity?
- Self-imposed barriers i.e. minimum giving threshold.
- Lack of understanding of diversity elements specific to that organization. (i.e. visual diversity, vs. age)
- Lack of available benchmarks (could use municipal statistics)
- Inability to look beyond our backyard.

Budgetary Impact:

- Establish filter: \$0 "perceived loss of board contributions" Board training for smaller charities.
- Raise ability to look out of our comfort zone: depends on size – local minimal. Determine whether losing an opportunity has a bigger impact than the direct cost to the association.
- Dollars follow real commitment by investing resources. Ex. Cultural audit or a search to help identify board members.
- Distracted by the fundraising needs of the organization.
- Board training to remove cultural biases – costs.



ACTION PLAN:

- Develop a paper on why diversifying board governance is important for a nonprofit organization.
- Encourage AFP chapters to include diversity/inclusion in chapter programs on governance.

4

EDUCATION/PROFESSIONAL DEVELOPMENT

Functional Areas:

- How to include diversity of different cultures/languages in fundraising education.
- What partnerships do we need to develop to advance diversity and inclusion – example: AFP International & Society for Human Resource Management & Council on Foundations.
- Minority institutes that bring up and coming professionals from minority communities and mentoring.
- Track of diversity topics for webinars and at the International Conference.

Potential Barriers:

- Dollars and demonstrative ROI.
- Influencers – leadership focused on the development of inclusive practices.
- Competing demands for organizational development.
- No access to enough formal professional education on diversity – consider offering webinars.
- Lack of AFP visibility in minority communities.

Budgetary Impact:

- Huge
- May not be able to afford to send staff to conferences where education is available.



ACTION PLAN:

- Encourage individuals from diverse communities (including individuals with multiple responsibilities in addition to fundraising) to join AFP to learn about fundraising and philanthropy.
- Incorporate instruction on diversity and inclusion in AFP curriculum at all levels and through a variety of venues (e.g., seminars, webinars, and current course offerings). Include diverse cultural examples in educational materials.
- Work with the AFP Foundation for Philanthropy to find funding for the curriculum development.
- Partner with organizations that represent diverse communities to provide mentoring opportunities for new professionals.
- Identify and highlight diversity and inclusion programs at the AFP International Conference.
- Encourage AFP chapters to offer Youth in Philanthropy programs for children in their communities.
- Encourage chapters to help found AFP Collegiate Chapters to provide education to college students who might want to consider a career in fundraising.

5

TERMINOLOGY/DEFINITIONS

Functional Areas:

- Create consistency across the board, beginning with comfort around diverse opinions. (it's okay if we look different, but they have to think like me)
- Create a solution that looks at language use.
- Create a matrix against which to measure our progress.

Potential Barriers:

- In many countries, there is no common understanding because there is no common history, values or vision for the future. Some countries have no interest in the North American model.
- There is a big difference between philanthropy and fundraising.



ACTION PLAN:

- Develop a “key” to language used in the diversity and inclusion realm.



6

MARKETING/COMMUNICATIONS

Functional Areas:

- Reframing how we talk about fundraising.
- Building tools for communities
- Ongoing conversation.

Potential Barriers:

- Competition for resources, how to prioritize.
- “Noise in the channel”. Lack of focus.
- Legitimacy – Bridge People.

Budgetary Impact:

- Wrap around grant to fund outreach initiatives.



ACTION PLAN:

- Create outreach vehicles to diverse communities, e.g., Kaleidoscope newsletter, social media.

ADDITIONAL COMMENTS:

- It takes commitment to move the needle. We must be concerned with how to keep diversity/inclusion at the forefront of people's consciousness, and not be seen in a negative light. This requires systematic change, embedded in everything we do. It's a kind of "viral infection."
- We can learn from the efforts of others, such as "Friends of Diversity" groups in chapters and ASAE's certified diversity professional designation.
- We could include diversity/inclusion in the AFP Code of Ethics and/or as a basic competency in the CFRE certification. Diversity/inclusion could be added as a module in the CFRE Review Course.
- Senior staff leaders should reflect the same diversity as the board.
- We need to consider how to reflect different career stages in our diversity/inclusion topics.
- It's important to begin discussion of diversity/inclusion at the elementary/secondary level – socialization.
- It is essential to define external communities of interest broadly (partners, collaborators, donors, etc.) and engage them.
- Conversations should get to the root of the issue
 - An effective way of making progress is to have several smaller conversations in order to make progress.
 - There is history in racial issues – must intentionally work on.
- Look at the notion of Rank-ism (somebodies and nobodies) – Robert Fuller.
- Good resources include Diversity Executive magazine, Diversity Journal.
- Look at the "imposter syndrome" (putting on a facade for others).

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APPENDIX:

A. Kelly Brown, director of the D5 Coalition, briefly described D5, an effort among philanthropic foundations to grapple with diversity/inclusiveness issues. Goals of the organization are to achieve lasting impact by drawing on the power of diverse staffs and boards, to forge genuine partnerships with diverse communities, and to increase access to opportunities and resources for all people. The organization's case is that diversity, equity, and inclusiveness help foundations advance the common good and achieve greater impact, keep up with changing constituencies, and increase effectiveness.

The four big goals of D5 are:

- Recruit diverse leaders for foundations – CEOs, staff, and trustees.
- Increase funding to diverse communities and ensure that foundations offer all constituents equal opportunity to access resources that they need.
- Improve data collection and transparency to measure progress.
- Identify the best actions we can take in our organizations to address diversity, equity, and inclusiveness.

B. Krishan Mehta, Executive Director, Campaign, Ryerson University in Toronto, described a collaborative venture in Ontario, "From Diversity to Inclusion in Philanthropy: An Action Plan for Ontario's Charitable Sector," a three-year project funded by the Ontario provincial government. The project will produce a series of conferences and workshops involving the fundraising community, donors, volunteers, and representatives from a variety of diverse organizations in a dialogue about diversity and inclusiveness that will result in an action plan for Ontario.

The objectives of the project:

- Develop cultural competencies on philanthropy.
- Refine identification, culture, solicitation, and stewardship tools.
- Promote and engage -- on the ground and at the leadership level.
- Enhance our understanding of the Diversity within Diversity factor.
- Offer cross-cultural/communication networking opportunities and research development.

Three conferences have been held thus far – on Chinese philanthropy, South Asian philanthropy, and Jewish philanthropy. Conferences during the remainder of 2013 will focus on African and Caribbean philanthropy, aboriginal philanthropy and women's philanthropy. In 2014 conferences will focus on LGBT philanthropy, Next Generation philanthropy, Francophone Ontarians, Muslim philanthropy, differently-abled philanthropy, and Hispanic philanthropy. Digital tools are in place to allow continuing conversations about these topics, including afpinclusivegiving.ca; Inclusive Giving on Facebook, @inclusivegiving on Twitter, and AFPinclusiveGiving online discussion group. He noted that organic affinity groups are resulting from communications surrounding the conferences, allowing the project to harness information on patterns and traditions of giving in diverse communities.

Some of the (learning) lessons from the conferences held so far:

- Get everyone on the same page.
- Look at your strategy. If it's not written down, it's not happening.
- Collaborate.
- Measure your effectiveness.
- Create opportunities, e.g., for networking.
- Leaders: Be aware. How can we be sure we're doing the right thing, and how do we correct it if not?

What donors are saying:

- Unpack your Diversity Committee.
- The "diverse" person isn't your only "go to" resource.
- Acknowledge and celebrate occasions that matter, e.g. International Woman's Day, Volunteer Appreciation Week.
- Focus on culture, not diversity.
- Be deliberate and honest about the stories you tell.
- Who asks matters to some people.
- Stewardship: It's always important.
- Be brave to adapt – at all levels.



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