



Session 1 – Follow Up Reading and Actions

Now that we have introduced you to the fundamental concepts of DEI work, here are the follow up steps for each of you

1. Mark where you are on the **Meyer DEI Spectrum Tool** in relation to your foundation's work and submit to us by the end of February.
2. Complete the **DEI Self-Assessment Tool** in relation to your foundation's operations and submit this to us by the end of February.
3. Have an **exploratory read** of the information below to start to understand what area of work your foundation would like to focus on.
4. Consider if you think you would like to raise any of the questions in the **Appendix**, in your foundation and how you could do this.

Our Arenas of Influence¹

As funders, as employers, as businesses that make investments and purchases, and as members of larger communities, grantmakers can turn their commitment to inclusion and diversity into an array of concrete practices. As the communities we support through philanthropy have become increasingly diverse, the need to become adept at employing inclusive practices has grown, too. Inclusiveness makes for more effective grantmaking and fosters success among the grantees we fund.

In devising a framework for applying these principles of inclusion, the Minnesota Council on foundations has identified *four distinct roles* played by grantmaking organizations: funder, employer, community citizen, and economic entity.

1. **As a funder**, the grantmaking organization has a wealth of opportunities to foster diversity. For many funders, a commitment to inclusion policies may trigger a whole new way of thinking about their grantmaking and how best to reach a diverse constituency with funding dollars. For some, it means including the community itself in the process. For other funders, it means investing in organizations whose daily work strengthens the fabric of a diverse society.
2. **As an employer**, a grantmaking organization shapes its staff and can also determine the composition of its board of trustees or directors, as well as volunteer staff and advisory bodies. The employer role provides important opportunities to bring diversity, in all its meanings, inside the institution.
3. **As a community citizen**, grantmaking organizations can contribute to the public good through their involvement in communities, not just through funding. Funders are well positioned to learn about the needs and issues of diverse constituencies and can often act as facilitators and initiators of community action. They can offer technical assistance and draw on resources that would be unavailable to many small non-profit groups. More important, funders can become equal participants in their communities, gaining valuable insight and knowledge through first-hand experience.
4. **As an economic entity** that invests its assets and operates as a business, buying supplies and services, grantmaking institutions can direct their financial activities in ways that amplify a commitment to inclusion and complement their grantmaking missions. Socially responsible investment policies are one way.

¹Building on a Better Foundation <http://www.nonprofitinclusiveness.org/building-better-foundation-toolkit-creating-inclusive-grantmaking-organization>

Foundation Characteristics and DEI

Family Foundations: <https://www.cof.org/content/ten-ways-family-foundations-consider-diversity-and-inclusive-practices>

Community Foundations: <https://www.cof.org/content/ten-ways-community-foundations-consider-diversity-and-inclusive-practices>

Independent Foundations: <https://www.cof.org/content/ten-ways-independent-foundations-consider-diversity-and-inclusive-practices>

Foundation Policies and Practices Toolkits

1. Examples of Foundation Diversity Plans and Policies:

<https://www.spra.com/wordpress2/wp-content/uploads/2014/07/TCE-Diversity-Toolkit.pdf>

[https://grantcraft.org/wp-content/uploads/sites/2/2018/12/Words to Action-Barbara Chow.pdf](https://grantcraft.org/wp-content/uploads/sites/2/2018/12/Words_to_Action-Barbara_Chow.pdf)

<http://www.equityinphilanthropy.org/2016/10/04/dei-grantmaking-checklist/>

<https://www.acf.org.uk/policy-practice/stronger-foundations/dei-working-group>

2. Toolkits to help communicate ideas about DEI:

<http://www.d5coalition.org/tools/communication-tools/>

Appendix 1

Questions for Discussion in your Role as a Grantmaker/Funder

- ▶ How do you determine your giving priorities and guidelines? Whose input do you seek? Do you involve members of the communities you seek to serve in assessing their needs and assets?
- ▶ Do you involve grantees in assessing your organization's funding process, accessibility, and understanding of their needs? How could you involve them?
- ▶ Do you have a network of advisors, however formal or informal, whose input you seek as you review applications and make grant decisions? How diverse is this network? How frequently do you add new people to your network?
- ▶ How have the demographics of your communities changed over the last five years and what are the future projections? What impact will those changes have on your grantmaking priorities? How should your grantmaking change as a result?
- ▶ What barriers do organizations serving your communities face in reaching diverse populations? Can you help them surmount these barriers through your grantmaking? Are some of these barriers evident in your own operations?
- ▶ Does your application process have requirements that serve as barriers to newer, emerging groups and communities?

Questions for Discussion in your Role as Employer

- ▶ What's the commitment of your board of directors and top management to diversity?
- ▶ Does your organization have clear strategies for increasing the diversity within your grantmaking organization?
- ▶ How could your organization benefit from diverse perspectives brought by diverse staff, consultants, or trustees?
- ▶ How could the values of your organization be better achieved through inclusive employment and board-selection practices?
- ▶ How do you provide opportunities for new employees to share their perspectives?
- ▶ Are there artificial barriers in the hiring process that screen out otherwise capable candidates?
- ▶ What value do you place on a candidate's knowledge of and experience in the community served by your organization?
- ▶ Are the perspectives of the community served reflected in the organization's decision-making?
- ▶ What have you attempted thus far and how would you rate your progress in building an inclusive organization?

Questions for Discussion in your Role as Community Citizen

- ▶ How does your grantmaking organization define community citizenship?
- ▶ How well do you know the different facets of your community and its leaders and how well do they know your mission and program staff?
- ▶ Do staff and trustees have community connections that could serve as resources for the organization?
- ▶ How can you develop and maintain a range of contacts to inform you about the communities in which you are making grants?
- ▶ Based on the priorities of your organization's mission and values, are there activities besides grantmaking that could inform you about a community and its needs and assets?
- ▶ How can your organization play the role of convener and broker of community relationships and resources?

Questions for Discussion in your Role as Employer

- Does your policy on inclusion and diversity extend to your investments and vendor relationships?
- ▶ In what ways could your organization's mission be enhanced if investment goals were more closely aligned with your grantmaking goals?
- ▶ How can your organization's assets be used to support the economic vitality of the communities your grants support?
- ▶ In what ways could your organization use its purchasing policies and investment strategies to accomplish its philanthropic mission?
- ▶ What organizations assist efforts to increase economic self-sufficiency of specific populations in your community? How can your organization support these efforts?

General Discussions in your Foundations

1. How does DEI show up in your mission, vision and values, strategic plans and workplans? How should they?
2. How fully has your foundation created a clear compelling mission driven rationale, with key leaders aligned and the organisation engaged ? What next steps are needed to create this clarity and alignment ?
3. How explicitly have you addressed inclusion in the organisations culture policies and practices? What initial steps can you take?
4. Who are the key internal constituents for elevating this work further within your organisation?