



PHILANTHROPY IN A CHANGING SOCIETY
Achieving Effectiveness through Diversity

Report Summary

BACKGROUND

In 2007, the Charles Stewart Mott Foundation awarded Rockefeller Philanthropy Advisors (RPA) a grant to report on diversity in philanthropy. With several leadership initiatives about to embark on encouraging diversity and inclusiveness as strategies for increasing foundation effectiveness, the Foundation and RPA wanted to provide their colleagues with useful data on progress to date and analysis of diversity programs funded by foundations in the recent past. In addition, this report was intended to inform the Foundation's efforts to connect its philanthropy grant program with its long-term commitment to racial equity. Therefore, diversity for this report focuses on race and ethnicity, specifically African American, Asian American, Latino and Native American populations.* However, the definition of diversity for many of the leadership initiatives and programs included in this report encompass many other communities such as women, LGBT (lesbian/gay/bisexual/transgender), disabilities, immigrant, rural, etc.

This report includes data and insights from various primary and secondary sources. The RPA team conducted a literature review, analysis of data collected by the Council on Foundations and Foundation Center from 1982 through 2006, and over 35 formal interviews with philanthropy professionals who have designed, implemented or participated in a diversity program.

The purpose of this report is to offer helpful background on the historical and current state of diversity in institutional philanthropy, and to stimulate discussions and commitment throughout the field. This summary and the full report are available as PDF documents at: www.rockpa.org/ideas_and_perspectives/publications.

ACKNOWLEDGMENTS

The authors thank the many individuals who offered advice, information and insight throughout the research and writing phases of this project and are listed inside the back cover. The authors are especially indebted to Kimberly Roberson of the C.S. Mott Foundation; Renée Branch and Judith Kroll and her research team at the Council on Foundations; Lawrence McGill and Steven Lawrence of the Foundation Center; Lori Villarosa of the Philanthropic Initiative for Racial Equity; and Henry Ramos, director of the Diversity in Philanthropy Project.

RPA acknowledges the following regional associations of grantmakers that have a deep commitment to fostering a multicultural and inclusive society through their programs, initiatives and leadership, and are implementing enhanced diversity initiatives over the next few years:

**Associated Grant Makers · Council of Michigan Foundations
New York Regional Association of Grantmakers
Northern California Grantmakers · San Diego Grantmakers
Southern California Grantmakers**

**Rockefeller Philanthropy Advisors thanks
the Charles Stewart Mott Foundation
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* For this report, demographic data on Asian Americans also includes Pacific Islanders to be consistent with data reported by the Council on Foundations. Therefore, the authors combined Census figures on both racial categories to arrive at comparable data. Hispanics and Latinos refer to the same demographic group, but are referred to as Latinos throughout except when "Hispanic" is part of a proper noun. Where Census information is presented, the Hispanic/Latino category includes Hispanics/Latinos of any race, while all other racial and ethnic categories are non-Hispanic. Native Americans and American Indians are used interchangeably for the same demographic group.

FOREWORD

The United States is diverse and becoming even more so as media, technology and commerce shrink the globe in distance and time. In addition, as world events unfold, we are becoming more aware of how interdependent we all are.

While how to effectively incorporate new and diverse perspectives has been a challenge for institutional philanthropy for over 30 years, it has assumed even greater importance as we address the major concerns of our time. Whether the issue is healthcare, security, poverty, education, the environment, the arts or the many hundreds of causes that philanthropy targets, the constituency that is impacted by charitable giving has changed and we in the philanthropic sector have not always recognized the full implications of this change.

Our mission at Rockefeller Philanthropy Advisors is to help donors create thoughtful, effective philanthropy throughout the world. Because we so value the contributions that diverse opinions and perspectives have on fostering creativity and progress, we believe that diversity increases effectiveness in identifying philanthropic solutions and increases responsiveness in the implementation of these innovations.

Philanthropy in a Changing Society: Achieving Effectiveness through Diversity is the first of three publications we are planning on diversity in philanthropy. This first publication is intended to offer helpful information on how the field's approach to diversity has evolved over time and the major strategies that have been piloted. The next two publications will engage philanthropic leaders, diversity experts and practitioners in deep thought pieces on the newest strategies and models for promoting inclusiveness throughout the sector.

We hope that this series of publications stimulates thought on this important subject and encourages discussion and, hopefully, engagement in the philanthropic community.

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Chair, Board of Directors

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PHILANTHROPY IN A CHANGING SOCIETY

Achieving Effectiveness through Diversity

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Report Summary

INTRODUCTION

Philanthropy reflects the collective values of private individuals and donors; foundations institutionalize these values. For over 30 years, foundations have been grappling with how best to include the diverse voices and values of the communities philanthropy tries to help to inform the development of solutions. Following the civil rights and identity movements of the 1960s and 1970s, the racial and ethnic diversity of staff and boards of foundations as well as grants and grant dollars targeting minority populations grew with the greatest strides in the 1980s. The momentum since the mid-1990s, however, has been much slower, even as the diversity of the United States and its interdependence with global communities continue to increase at an extraordinary pace.

Within the changing context of government's role as the safety net for vulnerable populations – the poor, racial and ethnic minorities, and other marginalized communities – there is growing skepticism as to whether private values are an equal substitute for public values that have survived a democratic vetting process. Recently, some segments of the public have become critical of a tenuous relationship between private philanthropy and vulnerable populations. There is growing public pressure for foundations to be more effective in their service to diverse communities and to be more responsive to their needs.

In September 2007, the U.S. House Committee on Ways and Means, Subcommittee on Oversight held hearings to examine whether public charities and private foundations serve the needs of diverse communities. Several experts testified that private foundations are not doing enough for disadvantaged communities. In its testimony, the National Committee for Responsive Philanthropy, a watchdog organization, criticized private foundations for “not doing as much as they could or should ...,” that the portion of dollars allocated to racial minorities and the poor are disproportionately small, and these allocations are not growing in pace with overall charitable giving.¹ Opinion pieces and editorials from the *Los Angeles Times* to *The New York Times* expressed similar sentiments in recent months.

In many ways, these critical views have overlooked the many positive contributions of the philanthropic sector and its complexities. But regardless of whether one agrees with the criticism or counters that philanthropy's added value goes beyond social welfare, in some circles there is a growing perception of institutional philanthropy as isolated and unresponsive.

Addressing diverse communities, however, is complex and the case for diversity has evolved as the understanding of what it takes to be a truly inclusive and democratic society has become more nuanced. Inclusiveness means sharing power and decision making with the entire range of constituents. Furthermore, diversity itself has become more diverse with burgeoning immigration, the surge of women into the workforce, the empowerment of those with disabilities and the growing visibility of LGBT identities.² The argument for diversity has grown from purely moral and legal grounds to marketplace pragmatism as consumers and the pool of available labor continue to change. And, with contemporary business management practices focused on team-generated initiatives, diverse perspectives are now promoted for their contributions to innovation. Diversity is valued for bringing about greater effectiveness, better solutions, progress and success.³ For foundations aspiring toward impact and relevance in a changing society, this case for increasing diversity to increase effectiveness is powerful and compelling.

In 2008, the philanthropic field is poised for renewed energy and commitment to including diverse perspectives in all aspects of institutional philanthropy. In addition to external pressures for increased accountability, transparency and effectiveness, new leadership within the field is directing attention to the urgent need to increase responsiveness and relevance in the face of intractable social and world problems. There is a growing recognition that the greatest challenges of the United States could and should benefit from collaborative thinking and the collective experiences of those who are disproportionately impacted by them.

DIVERSITY NOW AND OVER 25 YEARS

How diverse are foundations today? As illustrated in Figure 1, in 2006 all staff diversity for the 802 foundations reporting to the Council on Foundations' annual salary survey reached 23.2%. Board diversity was 13.0% for the 515 foundations responding to the Council's survey on foundation governance.⁴ In aggregate, diversity in foundations lagged behind overall national population figures for which the major minority categories comprised 33.8% according to the U.S. Census Bureau.⁵ Furthermore, the proportion of diversity within various staff titles varied greatly with senior levels much less diverse, as is consistent with employers more generally. For instance, although CEO diversity totaled a mere 5.8%, program officer diversity totaled 35.0%.⁶

The higher diversity level among program officers is noteworthy, because program staff are charged with making grants and serving as the "scouts" for important community issues. They are the primary "line producers" of grants, as well as the day-to-day communicators to those outside the foundation, especially the beneficiary constituents.

While program officers were much more diverse than all staff, the category of all professionals was somewhat less diverse at 21.3% in 2006. There are no conclusive explanations for this. Some of those interviewed noted that the operational ranks of foundations tend to be very small and that most diversity recruitment efforts have been focused on program staff.

Demographic composition within the program officer category is complicated, as presented in Figure 2, which shows the proportion of various minorities among program officers. In 2006, African Americans comprised 16.9% of program officers, which is somewhat above national representation of 12.2% in the general population. Similarly, Asian Americans were 8.1% of program officers compared to 4.4% of the population.⁷ In contrast, Latinos, at 7.3%, were sig-

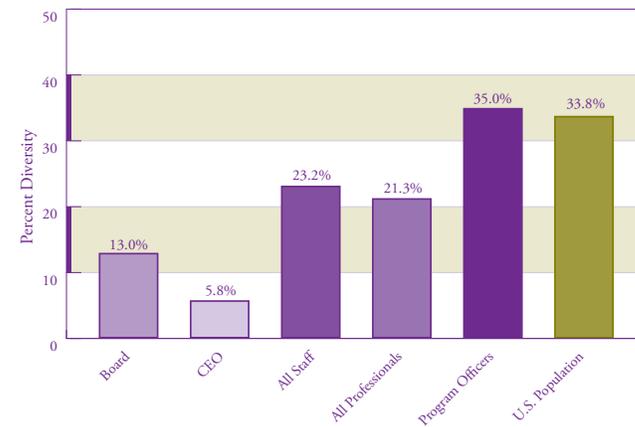
nificantly under-represented relative to national proportions at 14.8%. Native Americans comprised 0.7% of program officers, similar to their national representation. There are only anecdotal observations for the reasons for Latino under-representation including lack of awareness of philanthropy as a viable career, education requirements for terminal degrees and a more recent history of recruiting efforts (compared to those for African Americans). Likewise, higher proportions of Asian American program officers could reflect the high education levels of this population.

National trends, however, can obscure a complete picture of how successfully foundations are responding to the marketplace of community beneficiaries. In the bar graph in Figure 3, diversity levels in four states are compared with diversity for all staff and program officers in the foundations that reported to the Council from those states.⁸

From Figure 3, it is clear that while diversity among program officers in California and Florida was higher than national demographic and general foundation trends in 2006, diversity was still below minority representation in the respective state populations. For instance, racial/ethnic minorities in California are 57.2% of the population, while program officer diversity is only 40.7%. But advocating proportional representation in any orthodox fashion would be a slippery slope. In contrast to the two aforementioned states, program officer diversity in Michigan and New York was higher than diversity in the respective states' general populations. However, many

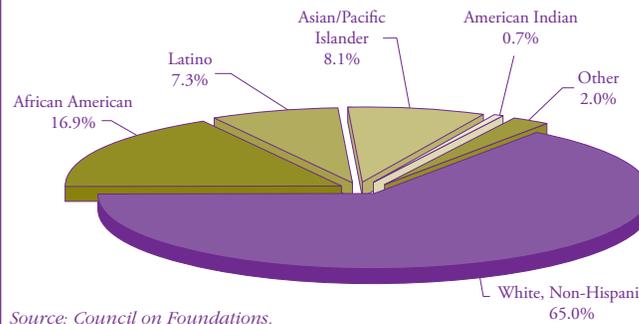
who argue for diverse personnel as a route to effectiveness would say that diversity should always be a goal, because it increases programming responsiveness. Furthermore, the disparity between foundation staffing diversity and the general population in major metropolitan areas is even more striking. This is significant since so many staffed foundations

Figure 1: Foundation Board and Staff Diversity (2006)



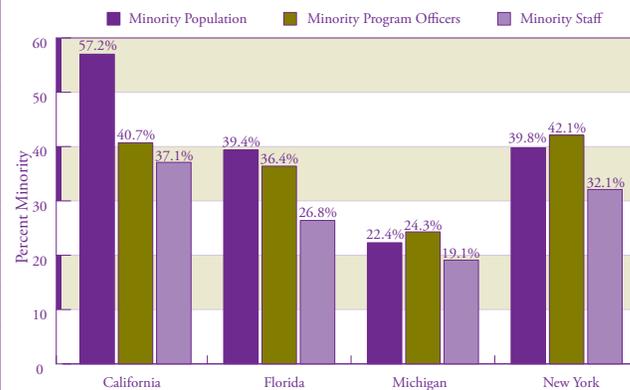
Source: Council on Foundations and U.S. Census Bureau.

Figure 2: Program Officer Diversity (2006)



Source: Council on Foundations.

Figure 3: Staff Diversity vs. Population Diversity in Four States (2006)



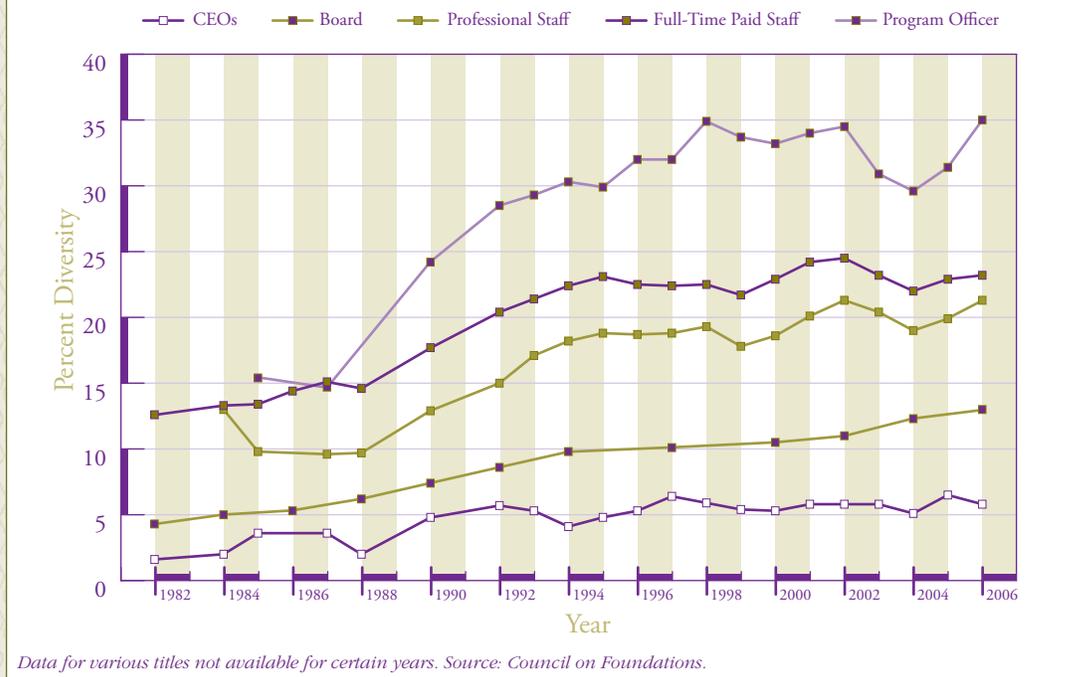
Source: Council on Foundations and U.S. Census Bureau.

are located in or focus their grants on major urban communities.

Is diversity similar for all types of foundations? When disaggregated by foundation type, in 2006, community foundations had the lowest rates of diversity for all categories including board, all staff, CEO and program officer. Independent foundations had the highest diversity rates for all staff and program officers. Corporate grantmakers had the most diverse pool of CEOs at 13.1% followed by public foundations at 10.6%. Both were significantly more diverse than independent and community foundation CEOs

at 5.5% and 3.7% respectively. The reasons for the differences are complicated. For corporate grantmakers, both marketplace pressures and past legal actions may have contributed to their higher diversity rates among CEOs. For independent foundations, their larger staff size may explain higher rates of diversity since greater diversity is correlated with both greater asset and staff sizes. Lower levels of diversity among community foundations may be due partially to their small average staff sizes as well as structural restrictions for board appointments. (Because the vast majority of

Figure 4: Staff Diversity (1982 - 2006)



The good news, of course, is that there has been much progress But progress has not been consistent throughout this 25-year period.

family foundations are not staffed, reporting diversity levels of personnel is less relevant, although they are included in aggregate totals of staff data.)

Figure 4 shows the growth in diversity among boards and various staff positions over 25 years. The good news, of course, is that there has been much progress over the 25 years. The proportion of diverse CEOs increased over three and a half times while board diversity tripled. But progress has not been consistent throughout this 25-year period. The greatest gains came within the first half of the period, and slowed down considerably in the second half. Although the proportion of board diversity climbed by 127.9% from 1982 to 1994, it then increased by only another 32.7% from 1994 to 2006. Similarly, the proportion of CEO diversity increased by 156.3%, and then by 41.5%. Finally, virtually all gains in diversity among program officers came between 1982 and 1993 when diversity nearly doubled, and thereafter, diversity only grew by 15.5% and actually dipped between 2002 and

2006. All staff diversity remained basically stable throughout the second half of the 25-year period, growing by a mere 3.6% from 1994 through 2006 compared to 77.8% for the earlier half of the period.

Senior professionals interviewed for this report made several observations about this phenomenon. First, during the earlier period, key leaders in major foundations and philanthropic institutions, particularly influential African American CEOs and high-level executives, used their power and influence to place diversity as a major issue for the philanthropic field. Most of these leaders retired during the mid-1990s and were not replaced by leaders with similar focus.

Second, several professionals noted that the political climate changed sometime in the mid-1990s. With affirmative action under aggressive attack and the Equal Employment Opportunity Commission adjudicating fewer cases, there was less external pressure to diversify. In *Short Changed: Foundation Giving and Communities of Color*, Rinku Sen and Will Pittz observed that, “Race-conscious policies and practices such as affirmative action, minority set-asides, and redistricting are increasingly critiqued, contested, and dismantled.” Furthermore, they can even be “suspiciously viewed as inherently racist and impermissible in a good, just, and supposedly colorblind society.”

And sadly, as an unintended consequence of the rise of multicultural awareness, the growing sophistication around diversity and the inclusion of multiple perspectives, diversity has become overwhelmingly complex to many. This has led to inertia for some.

Although not a focus of this report, it is noteworthy that throughout this 25-year period the entire foundation field became overwhelmingly “female,” and by 2006 women rep-

resented 75.8% of all staff and 74.0% of all program officers. This growth was slow, but steady, with the female proportion of all staff already a majority at 65.6% in 1982. While most of this growth was achieved in periods earlier than the 1990s, from 1990 through 2006 white female presence among all staff and program officers was relatively stable at a bit below 60% for all staff and around half of all program officers. This data suggests that it may very well be that minorities made gains in all of the staff categories primarily through the progress of minority women benefiting from the momentum of the women's movement in addition to pro-

grams boosting racial diversity. Unlike other minority groups, however, white women do appear to be breaking through the glass ceiling in greater numbers and proportions. By 2006 white females comprised 31.0% of board members and 51.5% of CEOs in foundations.

It would be important for the field to analyze and learn from the successful advancement of white women in philanthropy and incorporate those lessons into the strategies of new diversity programs targeting racial and ethnic minorities.

GRANTMAKING TO MINORITY COMMUNITIES

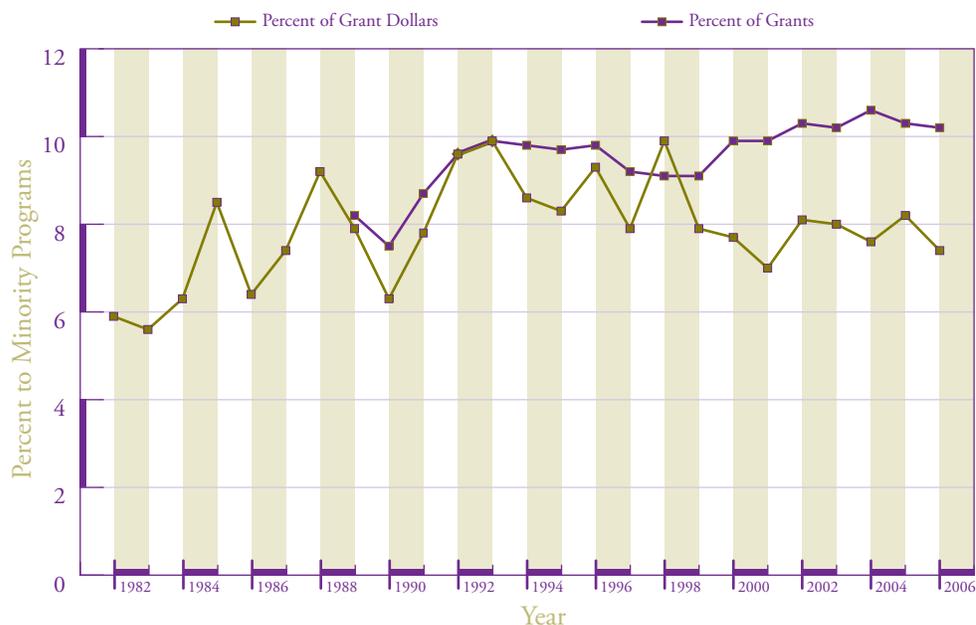
The question of the value gained by having a diverse workforce and boards at foundations is complicated and sensitive. Ultimately, the test is how diversified governance or staffing impact a foundation's major functions and its relationship with its beneficiaries – nonprofits and their constituents.

According to the Foundation Center's analyses of grants of at least \$10,000 made by larger foundations in 2006, those grants targeting any one or multiple ethnic or racial minorities comprised about 7.4% of total grant dollars and 10.2%

of all grants. These figures, of course, do not include grants that have broader target populations that may encompass ethnic and racial minorities. They only represent those grants that specifically indicated a benefit for an ethnic or racial minority group or that funded an organization identified by the Foundation Center as serving ethnic or racial minorities as part of its core mission. More detailed reporting by foundations would undoubtedly have raised these shares, and recent research by the Center suggests that these figures may be understating the total share of grant dollars directed to predominantly ethnic or racial minority populations by as much as 50%. This, however, would only raise the dollar share to 11.1%.¹⁰

Nonetheless, these sets of data points do serve as indicators of programming consciousness with regards to minority communities when analyzed over time, as illustrated in Figure 5. Throughout the reported period there was slow growth in both the proportion of grant dollars and number of grants targeting minority populations. And while the Foundation Center notes that increases over this period were

Figure 5: Grants and Grant Dollars for Minorities (1982 - 2006)



Data on percent of grants unavailable prior to 1989. Source: Foundation Center.

This would suggest that the relationship between increased diversity in human resources and in grantmaking focus is complex and needs further study. While grantmaking to exclusively minority programs did not necessarily increase in direct relation to the increases in staff diversity, grants and grant dollars did rise during the period when program staff diversity increased and did stabilize during the same period when program officer diversity rates flattened.

DIVERSITY PROGRAMS: PROGRESS & CHALLENGES

Since the mid-1990s, several foundations have designed and established programs to increase foundation responsiveness to diverse communities. The program strategies evolved over time from those addressing purely human resources and recruitment issues to institutional change strategies as proponents for diversity transitioned to the more comprehensive framework of “inclusiveness.”

The following are brief descriptions of the major program strategies. For detailed descriptions and analysis of all the programs included in RPA’s field scan, see the full report available at: www.rockpa.org/ideas_and_perspectives/publications.

- **Internships/fellows programs** – These programs vary greatly with some focusing on entry-level candidates and others on mid-career professionals. They offer a variety of services including employment at a philanthropic organization, educational and training programs, research projects, degree or certificate programs, and mentoring and networking within the program and across foundations. Both The San Francisco Foundation and Associated Grant Makers (Massachusetts and New Hampshire) run examples of model fellows programs.

- **Diversity toolkits & resources** – These are case studies of foundations and “how to” manuals that offer directions and tools for many strategies that support the establishment of inclusiveness policies and practices that span all roles of a foundation – grantmaker, employer, business and civic leader. They include tools for facilitated discussions on inclusiveness, curricula for best practices, institutional diversity self-assessments, etc. Mary Ellen Capek’s *Effective Philanthropy* is an example of an excellent resource.¹¹ *Grantmaking with a Racial Equity Lens*, created jointly by GrantCraft and the Philanthropic Initiative for Racial Equity is a model toolkit.¹²

The likelihood of institutionalizing progress is limited without commitment from leadership and governance.

- **Comprehensive community foundation programs** – There have been two multi-year programs that supported efforts of community foundations to conduct deep internal and broad external diversity analyses and pilot programs. The Ford Foundation’s four-year Diversity Initiative for Community Foundations started in 1993 and included 20 community foundations. The Charles Stewart Mott Foundation implemented *Leading By Example* from 2002 to 2006 with four community foundations. Both programs were national and included peer meetings, training and technical assistance from outside resources.

- **Diversity funds** – Since the late 1990s, several founda-

tions have been exploring ways to encourage philanthropy among emerging donor communities, especially with African American, Asian American, Latino and Native American donors. To date, the W.K. Kellogg Foundation, The California Endowment and the Ford Foundation have made the greatest investments in the development of diversity funds

The program strategies evolved from those addressing purely human resources to institutional change strategies rooted in “inclusiveness.”

- basically community foundations defined by shared cultural and philanthropic interests rather than solely geographical definitions. These programs funded a mix of donor engagement, community research, fund development and community grantmaking.

- **Affinity groups** – As early as the 1970s, diverse foundation personnel, especially program officers, began discussion groups and social networks across different foundations and regions independent of their employers. The Association of Black Foundation Executives began in 1971 followed by Hispanics in Philanthropy in 1983. Both Native Americans in Philanthropy and Asian Americans/Pacific Islanders in Philanthropy were founded in 1990. All started as informal support networks for minority professionals in the field who felt isolated. Services focused on job and talent banks, informal mentoring of junior personnel coming into the field, and professional development opportunities. In the later years, particularly in the mid-1990s and continuing today, these affinity groups provide the field with research and position papers on issues that impact their respective communities. They also have been the consistent voice for increasing the diversity of foundations since their inception. They have collaborated with each other as well as with other organizations such as Women & Philanthropy and Funders for Lesbian and Gay Issues. In 1993, they collaborated to form the Joint Affinity Groups (currently called Change Action Partners).

The above programs offer participants many benefits and opportunities. This is most true for entry-level and mid-career individuals interested in programming and foundations interested in developing program staff. However, interviews of program directors and participants revealed the following observations across the programs.

- **Role of leadership** – No matter how well designed, well implemented or beneficial a program is, the likelihood of institutionalizing progress is limited without commitment from leadership and governance and without resources allocated from within.

- **Scale and duration** – To have a national or field-wide impact, it is necessary to invest significant resources to increase the number of participants and duration of programs. Most of the internships and fellow programs support three to 12 individuals. Most are only for a few months. The

largest community foundation program to date was a four-year program serving 20 out of a potential of over 600 community foundations. Therefore, impact was primarily on individuals and individual foundations.

- **Program evaluation** – Due to limited resources, there have been no impact or outcome evaluations conducted, resulting in limited lessons to be shared, advocacy efforts and replication opportunities across the field.

- **Dissemination and usage** – Anecdotal responses from informants noted that the toolkits and resources offer practical advice and have been very helpful for educational and outreach programs and for internal advocates making the case for diversity to leadership and boards. Unfortunately, there is limited documentation on how broadly these resources have been disseminated and on the experiences of foundations that have used them.

- **Field infrastructure** – The foundation field suffers from lack of a formalized recruiting system and leadership career track – not only for people of color, but for all human resources.

- **Connections across programs** – Intentional communications and coordination between the programs would extend their impact across foundations, time and the various stages of diversity programming. Fellows programs need to be connected to recruiting vehicles and foundations seeking staff. Those embarking on institutional changes need to be connected to appropriate resources and supports.

- **Human resources** – Focusing solely on staff and board diversity is limiting, especially in light of the enormous number of family and community foundations that have few or no staff, and the many forms of philanthropy that have be-

Leaders are learning to deepen their understanding of vulnerable communities to find new strategies for addressing root causes of disadvantage.

come popular in recent years (e.g. giving circles, donor-advised funds, funding collaboratives, etc.). There are many ways foundations can reach out and interact with communities as business entities that hire, contract, and invest; as civic leaders that convene and participate on advisory committees and panels; and most of all as grantmakers.

From these program experiences, many in the field now realize that diversifying staff without linking these efforts to the work and operations of foundations is no longer sufficient. Executives are finding that they need to deepen their understanding about racial and ethnic minority communities, more effectively direct grants to these communities and to find new strategies for addressing the root causes of disadvantage by working with these communities and their leaders.

MOVING FORWARD: LEADERSHIP & ADVOCACY

In recognition of the subtle but difficult challenges that inclusiveness and diversity present, a number of efforts are underway to mobilize leadership.¹³

In 2007, a diverse consortium of leading foundation trustees, senior executives and philanthropy network leaders formalized a three-year initiative, the Diversity in Philanthropy Project, chaired by Robert K. Ross, president of The California Endowment. Aggressively promoting diversity as a major vehicle for increasing foundation effectiveness and responsiveness, these leaders agree to incorporate

inclusiveness since the mid-1990s, the Council on Foundations, under CEO Steve Gunderson, has renewed its focus on diversity with enhanced programming and the hiring of an executive position to move the inclusiveness agenda forward. Over the next few years, the Council will launch three priority program strands including developing the diverse pipeline of trustee and executive talent, integrating diversity and inclusiveness throughout education programs and increasing outreach and communications on the importance of these issues for all foundations. The Council is also actively

working to identify ways to measure the progress of this work.

Around the country a number of regional associations of grantmakers in states such as California, Massachusetts, Michigan

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and New York, have begun to work with their memberships and leaders to focus on how to embrace and incorporate inclusive policies and practices to be responsive and attuned to community issues. They are increasing research on philanthropy's reach into their respective communities and tracking progress more methodically as they engage their membership. They are working across organizations to launch initiatives that promote and deepen diversity throughout philanthropy.

inclusive operating principles at their respective institutions. They are looking at their foundations as important economic and civic entities – not just employers and grantmakers – and will be engaging other foundation leaders with these issues. This network is proposing a number of collaborative initiatives including ongoing field-wide research, advocacy and mutual support as peers grapple with the challenges of promoting philanthropic effectiveness in a diverse world.

Moreover, to address the slow progress of diversity and in-

SUMMARY & RECOMMENDATIONS

From this research project, Rockefeller Philanthropy Advisors suggests the following strategies as logical extensions of the successes achieved by the field thus far.

- **Increase advocacy and outreach by networks of foundation leaders and philanthropy affinity groups** who embrace the urgent need for comprehensive approaches to diversity and inclusiveness to build an effective and responsive philanthropic sector, and improve communications to the public about the broader societal role of philanthropy.

- **Create new partnerships and collaborations with diversity or ethnic funds** to identify and support philanthropic leaders of color. These funds can also work with the mainstream to get funding deep into grassroots and minority-led organizations as well as offer culturally responsive solutions to intractable social challenges.

- **Improve and expand existing internship/fellowship and community foundation programs**, including evaluation and publicizing program results throughout regional and national philanthropic forums; convening workshops for the curious but uninitiated on implementing similar programs; and connecting participants during and after program participation with local and regional resources.

- **Deepen metropolitan/regional saturation** by looking at multiple strategies and programs within a given location or region, especially those areas where minority populations are rapidly becoming the majority singly or collectively, and funding the programs over significant periods of time.

- **Increase research on trends in staffing, board composition and grantmaking** nationally, regionally and by major metropolitan areas; by size and type of foundations; and by programmatic focus so foundations can more accurately track changes within the field and establish institutional and sub-sector benchmarks.

- **Strengthen collaborations with key regional associations of grantmakers and special constituency affinity groups** to connect diverse professionals and leaders with foundations filling positions, increase education and awareness of best practices for inclusiveness, and strengthen direct connections between foundation professionals and the issues in communities of color from their respective perspectives.

- **Build new partnerships and collaborations with philanthropic associations, affinity groups and other nonprofits** working to increase the visibility and participation of disenfranchised groups into mainstream philanthropy such as those supporting women, LGBT issues, those with disabilities, immigrant communities, etc. Many of the issues are similar and many groups are already working with racial equity and ethnic diversity organizations. In some cases, these movements have already had major achievements from which much can be learned.

Finally, to achieve traction and saturation throughout the field, it is necessary for the major national and regional philanthropic associations to place diversity and inclusiveness as a priority and imperative for the foundation field. Without this field leadership, all programs will be working against the tide and in isolation, dependent on the specific personnel involved and gone when they leave. There has been a great deal of progress over the past 25 years, albeit not uniformly and consistently over time and across the entire field. The leadership of the field should renew and intensify this momentum and coordinate multiple strategies to leverage the progress achieved thus far.

ENDNOTES

- ¹ Aaron Dorfman, Executive Director of the National Committee for Responsive Philanthropy, "Creating a Philanthropic Sector that is More Responsive to the Needs of Diverse Communities," (testimony, House Committee on Ways and Means, Subcommittee on Oversight, Washington, D.C., September 25, 2007).
- ² LGBT is a commonly used acronym for lesbian, gay, bisexual and transgender.
- ³ Scott E. Page, *The Difference: How the Power of Diversity Creates Better Groups, Firms, Schools, and Societies*, (Princeton: Princeton University Press, 2007).
- ⁴ All data on staff and board diversity referenced in this report came from various sources from the Council on Foundations including several statistical tables and analyses specially requested and provided to RPA by Judith Kroll, Director of Philanthropic Research, and her team, and referenced here as: Judith Kroll et al., *Statistics for RPA Report to Mott*, (Washington, D.C.: Council on Foundations Research Department, February 5, 2008). Published sources for the data include *Foundation Management Series*, 12th edition, (Washington, D.C.: Council on Foundations, 2006); *The Foundation Governance Report*, 13th edition (2008, forthcoming); and *Grantmakers Salary and Benefits Report*, 2007 edition, (Washington, D.C.: Council on Foundations, 2007).
- ⁵ U.S. Bureau of the Census, *Demographic and Housing Estimates*, 2006 American Community Survey, (Washington, D.C.: Bureau of the Census, 2006). All U.S. demographic information cited in this work is from the U.S. Census Bureau's 2006 American Community Survey, available at <http://factfinder.census.gov>, and was accessed on March 19, 2008.
- ⁶ Program officer is only one of the five professional program titles coded by the Council on Foundations research department. The other four titles include program vice president, program director, senior program officer and program associate. However, program officer is by far the largest category of program staff.
- ⁷ The 4.4% Asian statistic combines the Census categories Asian Americans (4.3%) and Pacific Islanders (0.1%).
- ⁸ Michigan, New York, Florida and California are used here to illustrate the variability of demographic composition across regions.
- ⁹ Will Pitz and Rinku Sen, *Short Changed: Foundation Giving and Communities of Color*, (Oakland: Applied Research Center, 2004), 1.
- ¹⁰ "Foundation Center Data for Rockefeller Philanthropy Advisors," *Grants Designated for Special Populations 1980–2006*, (New York: Foundation Center, 2008). Data on minority-targeted grants was produced for RPA by the Center specifically for this report.
- ¹¹ Mary Ellen S. Capek and Molly Mead, *Effective Philanthropy: Organizational Success through Deep Diversity and Gender Equality*, (Cambridge, MA: MIT Press, 2006).
- ¹² Julie Quiroz-Martinez, Lori Villarosa and Anne Mackinnon, *Grantmaking with a Racial Equity Lens*, (New York: GrantCraft, 2007).
- ¹³ While this report focuses only on racial and ethnic minority progress in institutional philanthropy, the leadership efforts in the field focus on diversity in a much broader context. Other marginalized groups include women, LGBT communities, those with disabilities, immigrant groups and rural populations. The Council's definition also includes ideologically varied and small foundations among others.

ADVISORS AND REVIEWERS

Rockefeller Philanthropy Advisors thanks the following individuals for their time and insights. Over 35 of these individuals participated in formal interviews during the research phase of this project, while the others reviewed early drafts of offering suggestions and connecting the authors with additional resources.

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Cindy Ballard

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