



Diversity, Inclusion, & Equity in Community Foundations

Team Planning Session: Organizational Values Statements

Although reaching consensus on an organizational values statement can be challenging work, the process of developing such a statement is both an essential and invaluable step in your organizational journey around diversity and equity. Whether you choose to develop this organizational values statement through a widespread bottom-up process, or through a stakeholder committee charged with developing a statement that later receives foundation-wide endorsement, the process of reaching consensus is a powerful opportunity for organizational learning and clarification of values, principles, and priorities. If it is truly reflective of an organizational consensus, the values statement can also serve as a powerful planning tool for organizing your efforts to strengthen the foundation's diversity, inclusion, and equity practices. Finally, the values statement can also be used by your staff and trustees to develop a set of concrete indicators and benchmarks to measure and evaluate your organization's progress in achieving your specific goals and objectives.

Overview of Session:

- Review and discuss a number of examples of values statements that were developed by other organizations, including one community foundation.
 - Consider and discuss whether your foundation's vision, values, principles, and intents are communicated clearly in the various public documents that currently represent your foundation.
 - Consider the benefits of developing a values statement that articulates your foundation's vision, values, operating principles, and objectives about diversity, inclusion, and equity.
 - Review and consider the use of a set of questions developed by California Tomorrow as a framework for fashioning your own organizational values statement.
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Clear articulation of your own core values provides the firm ground upon which all community foundation's efforts can stand. It enables the community foundation to inspire change in others; it enables the community foundation to serve as a model and an inspiration that others can emulate, adapt, or contrast themselves with.

Clearly stated values and vision cue people inside and outside the community foundation to what the community foundation hopes for and expects of them. This information enables others to unleash their own creative powers consistent with that vision...

Improving Race Relations and Undoing Racism: Roles & Strategies for Community Foundations, Rainbow Research

Suggested Approach For Meeting:

(10-15 Minutes) Included in this packet are several copies of organizational values statements other organizations have developed to articulate their vision, values, operating principles, and intents about diversity, inclusion, or equity. Take a few moments to review and discuss the statements. If you have limited time, you might consider assigning each member of your team one statement to read and comment on. What did you like about the statement? What didn't work for you? Do you think it is written a manner that is useful in guiding the organization's efforts related to diversity, inclusion, or equity?

(20-30 Minutes) Then, take a few moments to consider and discuss how issues of diversity, inclusion, or equity are covered in your current mission statement and any other related statements or policy (e.g., an EEOC statement, investment policy, etc.) that have been approved by your Board of Trustees. Do these statements clearly articulate your organization's vision and core values as these relate to the diversity, inclusion, and equity issues you consider most important in your foundation and community?

Are there other public documents that also speak to your foundation's values or principles about diversity? For example, do any of your program guidelines implicitly or explicitly lay out your foundation's values and intents about diversity, inclusion, or equity? Do any of these guidelines lay out expectations about how prospective grantees should approach issues of diversity? Of inclusion? Equity? If so, how do these expectations square with the values and principles currently communicated in your mission statement?

(10 Minutes) Take a few moments to think about and discuss the pros and cons of developing and using an organizational values statement as you work to strengthen your foundation's diversity, inclusion, and equity practices. Consider some or all of the following questions:

Embracing the principles of inclusion [and equity...added by CT], though requires more than just hiring new faces or channeling grants to a bypassed nonprofit. It requires opening minds and doors to new perspectives and worldviews that often don't find a place at the grantmaker's table. It is an on-going process of rethinking the work we do as well as the relationships we build with the wider community. Many grantmakers have already begun to incorporate inclusiveness and diversity into their structure and operations. Others would like to do so but perhaps lack the resources or a basic framework to get started. Still others may have seen their initial efforts at inclusion trigger unanticipated problems and have shied away from venturing further. There is no blueprint for an inclusive organization that is appropriate for all funders...

Building on A Better Foundation, Minnesota Council on Foundations

Has the question of what diversity, inclusion, or equity means to your various stakeholders been raised through your various LBE efforts? If so, do you think there is any consensus about the meaning of these words among your various stakeholders?

Have your various LBE efforts led to a sense of shared values or principles that you could use to guide your internal and external practices? Or do you think more work is needed to develop shared values?

If there is a shared sense of values among your foundation's stakeholders, do you think they also have consensus about what it would look like to operationalize those values? Is more work needed to arrive at a set of core operating principles staff and trustees could use to guide efforts related to diversity, inclusion, and equity?

What could you do at this stage of the LBE work to further your foundation's efforts to build consensus around a shared vision for change and the values and principles needed to bring about that change?

Preliminary Questions & Approaches:

Like the process you choose to reach consensus on the statement, there is no formula for deciding what to include in your organization's values and interest statement. Depending on your organization's history of dealing with equity and diversity and any number of strategic organizational concerns, you may consider including brief statements that represent an organizational consensus about the following:

- o What is your ideal vision or how diversity should be embraced and valued in your community? This is a picture of what you would want to see; not necessarily what currently is. What are the values or principles that you hold dear or that form the cornerstones of your vision about diversity in your community? How do these values or principles relate to your organization's core mission or purpose?
- o Why do you believe that others should work to clarify their own, or embrace the values and principles you hold dear? Why now? What is at stake? How would embracing these values or principles help the community (and or constituencies you serve) respond to the fundamental demographic shifts that are taking place now and into the near future? How would embracing the values and principles help to address both enduring and emerging equity dilemmas? How would embracing the values and principles help to take advantage of the opportunities the new demographics create? What are the consequences of putting off this important societal work?
- o What are some of the ways in which your organization will work to strengthen its capacity to "lead by example" in this area? What are the practical steps you will take to become more diverse? More inclusive? More equitable? How will your organization measure progress and success in these areas? How will you hold your organization accountable?
- o What will you do to promote your values and principles in your community? What will you do to help other organizations and institutions in your community do the same?

Operating Principles:

If you chose to develop an organizational values statement, you will want to consider which aspects of your foundation's organizational practices to frame your operational principles around. Throughout this project, we have been asking the four community foundations to reflect on and examine their practices around the following operational areas: governance; business practices (including vendors, investment practices, communications, staffing and professional development, and etc.); donor development, grantmaking, and community leadership.

You may also focus your work to develop operational principles around the role the foundation plays in your community. For example, the Minnesota Council on Foundations suggest foundations consider developing their operational principles around the foundations roles as (1) a funder, (2) an employer, (3) a community citizen, and (4) as an economic entity.

The final decision about core operating principles, like the decision to clarify and articulate your core values, is up to you and your foundation stakeholders. As in all strategic organizational development matters, we believe the more explicit organizational leaders are about their vision and intents around diversity, inclusion, and equity, the better the chances become that those leaders can work productively together toward achieving their aims.

Notes & Next Steps:



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