

MEMORANDUM

February 7, 2003

To: Members of the Leading By Example (LBE) Network

From: William W. Ginsberg

Re: Progress Report on Diversity, Equity and Inclusion Work at The Community Foundation for Greater New Haven

This memorandum provides background information for our upcoming February 10 discussion concerning the work on diversity, equity and inclusion issues being undertaken by The Community Foundation for Greater New Haven (CFGNH). Specifically, I have endeavored to briefly summarize the organizational change process that is underway here, the ways in which diversity issues are a part of that change process, the work we have undertaken to date on diversity issues and our plans for continuing that work in 2003 and beyond. I very much look forward to the feedback of the members of the LBE network on these issues next week.

As I indicated at the outset of our work together a year ago, CFGNH's work on diversity issues has been part of and is related to a more comprehensive process of strategic and organizational change that has been underway here since the beginning of 2002. Over the last year, CFGNH has adopted a new strategic framework for how we relate to the local external philanthropic marketplace and a new operational approach to how we do our work internally. In doing so, we have come to the view that successfully grappling with diversity and inclusion issues at CFGNH is integral to our successfully implementing these organizational changes.

Context: Repositioning CFGNH

After this past year of strategic and organizational planning, CFGNH has come to see our role differently. We are transcending the ways in which we have traditionally related to our community – as a programmatic grantmaker and as the community's endowment – to take on the new role of *mobilizing philanthropy*. By inspiring people with a sense of what can be accomplished through effective community-wide philanthropic efforts on priority local issues, we believe that CFGNH can mobilize

more local giving – from individual donors, from local and national philanthropic institutions and from government at all levels – both for CFGNH and for non-profits in the community broadly speaking. To do so, CFGNH is working more proactively and collaboratively with the philanthropic leaders in our community in defining and addressing priority issues and in bringing the networks of donors involved with those leaders together with the non-profits and others involved with those issues.

Our new role with donors depends on our ability to convey our knowledge and perspective on the issues, challenges and opportunities facing our community. At the same time, our new role with non-profits depends on our ability to help them engage the donor community. For these reasons, our work with our program constituents – which are disproportionately non-profits serving the poorer, more urban and more heavily minority population in our region – and our work with our development constituents - who are generally a wealthier, more suburban and whiter population – must be more fully and effectively integrated with one another.

Last October, when I updated our Board of Directors on our work with the LBE Network just prior to our meeting in Milwaukee, I wrote the following:

As this work has proceeded parallel to our strategic planning, it has become clearer and clearer to me how intertwined these issues are. At the broad strategic level, as this institution reconsiders the role we play in our community, we must consider how to be of service to all elements of the community and how to position ourselves to be a cohesive force among those different elements. At the operational level, this community's diversity is reflected so clearly in the different constituencies with which we work on a day-to-day basis. For our development and program operations to become truly integrated as we envision will require having the entire institution understand as fully as possible the perspectives, priorities and concerns of all of our constituencies and understand what divides us as a community, whether they be divisions between donor and not-for-profit perspectives, or between urban and suburban perspectives or between different racial and ethnic groups. If we are to fulfill our potential as an institutional link between donors and the needs of the community – a role we often speak of for The Foundation and a role which we are strengthening our ability to play through our new strategic directions – we must develop as strong an appreciation as possible for how to bring these diverse constituencies together.

The CFGNH Board supported this view that, for CFGNH to play more of a leadership role in our community, we must grapple with issues of diversity and inclusion, both externally and internally. We are undertaking to do so, both by reaching out more affirmatively to potential philanthropic leaders in the minority community and by planning for an intensive program of diversity training at CFGNH in 2003-04.

Communities of Color: Outreach to the Minority Community

In 2002, CFGNH launched our Communities of Color initiative with the following four objectives:

- To improve awareness of philanthropic opportunities for local communities of color;
- To provide learning opportunities on high-priority issues disproportionately impacting communities of color;
- To build the capacity of non-profit institutions that serve communities of color; and
- To increase charitable giving by communities of color and charitable giving to minority-led non-profits.

The Communities of Color initiative was launched this past fall with a series of focused conversations with leaders in the African-American and Latino communities. Over several weeks, eight two-hour meetings were held involving a total of thirty-six participants, representing business leaders, political leaders religious leaders, other community leaders and young professionals. These focus conversations were designed to provide information as to (i) the perception of CFGNH among these individuals, (ii) the top priority issues are in these communities of color and (iii) the actions that CFGNH should consider in an effort to mobilize philanthropy in these communities of color.

My hope is that a small cadre of volunteer leaders will emerge from these discussions to work with CFGNH to advance the goals of the communities of color initiative. Already, an African-American advisory group has emerged. It will meet for the first time later this month.

The focused conversations certainly succeeded in providing us with much valuable information. The input we received showed that there is much work to do to educate communities of color about philanthropy in general and about CFGNH specifically. This input showed further that there are certain prevalent negative perceptions of CFGNH that will also require much work to reverse, specifically (i) that CFGNH is not particularly responsive to communities of color, (ii) that CFGNH is viewed as an “elitist” institution, and (iii) that CFGNH is overly bureaucratic and therefore difficult to navigate.

On the other hand, those participating in these meetings were pleased that we have initiated this dialogue and were very constructive in offering many recommendations that we could pursue in order to better serve communities of color.

As we proceed with Communities of Color, we will be exploring a number of possible activities to achieve the goals of the initiative. Activities under consideration include a public awareness campaign to promote philanthropy generally, various kinds of social events to build awareness of the initiative, a forum on one or more issues of particular concern as identified in the focused conversations, a Communities of Color lecture series and the establishment of an umbrella Communities of Color fund. In addition, CFGNH's capacity building work with non-profits will support Communities of Color by targeting our capacity building resources to minority-led non-profit institutions.

CFGNH's 2003 program budget includes \$55,000 for Communities of Color activities (exclusive of capacity building).

CFGNH Diversity Training and Policy Review.

As a complement to our Communities of Color initiative, and as an integral part of the overall strategic and organizational changes that are underway, CFGNH is currently finalizing arrangements for a consultant to work with us to implement a comprehensive diversity training program for our board and staff during the period from March, 2003 through July, 2004.

This diversity training will have the following components:

- A full-day diversity awareness workshop for the entire organization that will address the community's changing demographics, the cultural backgrounds of colleagues, each individual's personal assumptions and perceptions and how they affect individual, group and team relationships at CFGNH, and the objectives of our diversity initiative and how it relates to our overall institutional goals;
- Two seminar series:
 - One for board members, executives and managers on "Leading a Diverse Organization", and
 - One for non-supervisory staff on "Working in a Diverse Organization";
- Opportunities for any board or staff member to receive face-to-face, telephone or electronic coaching in how to use the knowledge and strategies covered in the training to best effect in one's individual work; and
- A two-hour follow-up meeting with CFGNH's board toward the end of the project to provide assistance and to report on progress.

CFGNH's 2003 program budget includes \$50,000 for this diversity training.

In conjunction with this diversity training, CFGNH will review its various policies and procedures from a diversity/inclusion perspective. This review will involve Board and staff and will cover matters ranging from our institutional diversity policy to our

grantmaking to our hiring, purchasing and investment management policies and procedures.

Conclusion.

CFGNH is an institution which is undertaking fundamental change in our community role, our work and our culture. One of our challenges is to understand the centrality of diversity and inclusion issues to all elements of this change. As we engage in a fuller dialogue about how to mobilize philanthropy that serves communities of color, and as we undertake to confront diversity issues individually and institutionally through training, it is my hope that, at all levels, we will achieve this understanding and become an institution better able to serve our diverse community.