ASPEN LEADERSHIP GROUP

Diversity and Inclusion in Healthcare Advancement: Changing Behaviors and Outcomes

Authors:

Angelique S.C. Grant, Ph.D.

Ronald J. Schiller

IN PARTNERSHIP WITH

AHP Association *for* Healthcare Philanthropy

Foreword

ALICE AYRES, MBA, PRESIDENT & CEO, ASSOCIATION FOR HEALTHCARE PHILANTHROPY

We stand at a pivotal moment in healthcare and in healthcare philanthropy. As the U.S. healthcare industry transforms towards a focus on maintaining the health of our communities rather than predominantly on acute episode management, conversations about inequity within our communities and the ramifications thereof are occurring with increasing frequency. In numerous presentations at conferences for healthcare leaders, CEOs of American healthcare systems and hospitals are challenging us all to focus on social determinants of health, especially the 80% that are not directly related to the delivery of healthcare.

This presents a powerful opportunity for healthcare philanthropy professionals. We can become the leaders for our hospitals and healthcare organizations on this important work and, in the process, create real diversity and inclusion within our teams, our communities and our donors. We have multiple roles to play:

- We can serve as direct connections to all the members of our communities
- We can engage donors interested in community impact and invite a broader and more diverse group of our community members into our work and our mission
- We can recruit and develop our teams and our boards to reflect our communities and their diversity

I am delighted that Aspen Leadership Group has dedicated time and resources to beginning a conversation on diversity, equity, and inclusion in advancement broadly and is focusing on healthcare specifically. In order to help all those in our communities lead the healthiest and most productive lives they can, we have to become more inclusive – to encourage diversity across age, race and ethnicity, gender, sexual orientation, and experience – in all aspects of our work. Our organizations and our communities will be healthier for it.

Introduction

"I WISH I COULD BUILD A MORE DIVERSE BOARD, RECRUIT MORE DIVERSE LEADERS, AND HIRE A MORE DIVERSE ADVANCEMENT STAFF, BUT THERE JUST AREN'T ENOUGH QUALIFIED PEOPLE."

In our advancement consulting and executive search work, we hear this misinformed phrase every day, from leaders in every part of the nonprofit sector and in every region of the country. In this article, we will draw on recent research and on our own experience to demonstrate that this statement is both incorrect and a major obstacle to progress.

Numerous studies have highlighted the disparities that exist in healthcare delivered to minority populations in our country. As a nation, we are coming to realize that in order to achieve optimal health in our society we have to address biases and other barriers that prevent us from accessing and serving diverse populations. The same holds true with philanthropy.

The need for the impact made possible by philanthropy and associated demands for fundraising revenue are greater than ever. Fundraising leaders can no longer secure the fundraising revenue their organizations require without building and retaining diverse boards, executive teams, and advancement teams and building fundraising programs that engage all potential donors.

Healthcare is paying close attention to disparities associated with diverse populations, including discussions about risk factors, access to health, and the need for new, diverse strategies for delivery of quality healthcare. Success in philanthropic engagement of diverse populations will require similarly focused attention—on awareness, access, and diverse strategies for recruiting talent and engaging the broadest possible spectrum of potential volunteers and donors.
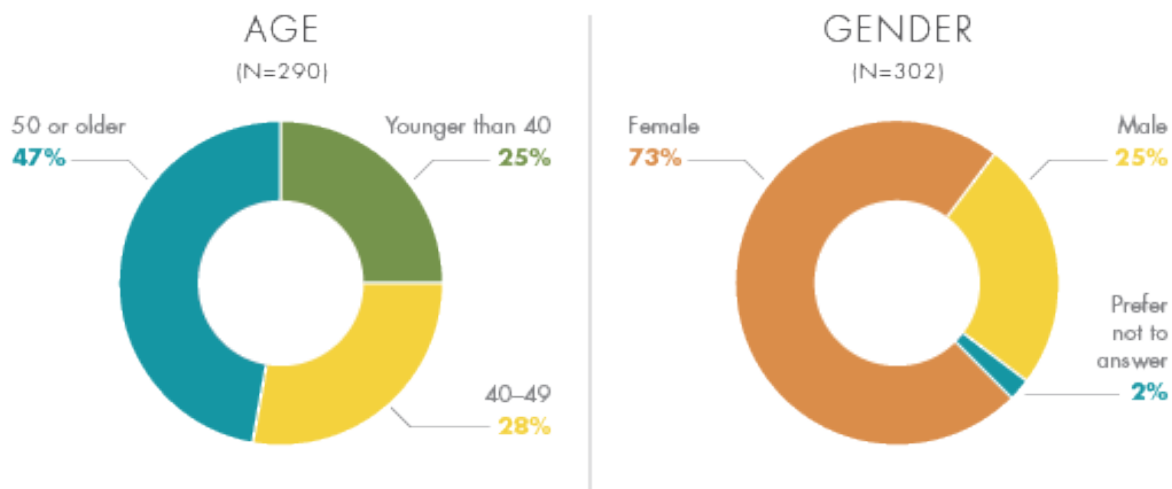
AHP SALARY REPORT
USA, 2018

Building Awareness

"INCLUSION IS NOT A MATTER OF POLITICAL CORRECTNESS. IT IS THE KEY TO GROWTH." - JESSE JACKSON

1. Diversity and inclusion lead to better business outcomes

Healthcare systems are keenly aware that diversity among staff, senior leaders, and the board are important to improving patient medical outcomes and reducing health disparities. This is true in other business sectors as well. In 2015, McKinsey & Company released a study of 366 companies that found that "when companies commit themselves to diverse leadership, they are more successful." (McKinsey & Company, 2015) Companies in the top quartile for racial and ethnic diversity are 35% more likely to outperform their respective national industry medians (McKinsey & Company, 2015). Companies in the top quartile for gender diversity are 15% more likely to outperform their respective national industry medians.

According to a 2013 report from Catalyst, diversity in gender, race, background, LGBT identity, and nationality all contribute to stronger performance (Catalyst, 2013). A better diversity climate also leads to better retention of all employees, higher employee satisfaction and engagement, and better problem-solving and creativity.

2. Meet even more **donors as they prefer**

"The goal for all fundraisers must be to meet all donors where they are, as opposed to using an outdated one-size-fits-all model. That may necessitate shifts in fundraising channels, in messaging and language, and even in governance. Given the pressing social and economic challenges we face, this effort has never been more important." (Blackbaud's Diversity in Giving, 2015)

Successful fundraisers know that it has always been important to meet donors as they prefer, with diversity in fundraising team members and strategies sufficient to address a diversity of donor motivations and approaches to giving. For some organizations, the diversity of the potential donor population is increasing; for others it is shifting. For most, diversity in the donor population has for some time been greater than the organization's capacity fully to engage that diversity.

According to the 2018 U.S. Trust Study of High Net Worth Philanthropy, "Giving is being shaped by a diverse donor universe of different ages, ethnic backgrounds, and gender identities." Also, "Women are at the forefront of philanthropic engagement and impact." (U.S. Trust Study of High Net Worth Philanthropy, 2018)

Diverse teams have more understanding, experience, and perspective upon which to draw, allowing them to be more creative about reaching more donors and engaging them more deeply. They can draw upon a

wider range of personal and professional experiences to identify more readily with a larger universe of donors and potential donors and to add broader perspective to all engagement strategies.

---

3. False assumptions related to donors cause fundraisers to ignore potential

Assumption: Diverse donors are "new and emerging" as philanthropists.

"The label 'new and emerging' denies history and perpetuates a limited definition of what philanthropy is and who counts as a philanthropist," says Tyrone McKinley Freeman, assistant professor of philanthropic studies at The Lilly Family School of Philanthropy at Indiana University, and co-author of Race, Gender, and Leadership in Nonprofit Organizations. **"The view also reinforces prevailing myths that people of color are primarily recipients of philanthropy but not agents of it. These constraints blind us to the vibrancy of philanthropy among people of color, until donors of color publicly announce gifts that fit the familiar mold. Then, we label these donors 'new and emerging' because they are defying the myths and finally coming into our limited field of vision."** (Freeman, 2018)

Blacks/African Americans are almost twice as likely, and Hispanics/Latinos more than twice as likely, as Caucasians to believe that large gifts can change the world or impact society for the better (25.5% African Americans, vs. 32.2% Hispanics, vs. 14.2% Caucasians).

Furthermore, Blacks/African Americans and Hispanics/Latinos report being significantly more fulfilled by their charitable giving than Caucasians, and they are significantly more likely to monitor the impact of their giving than Caucasians. (U.S. Trust Study of High Net Worth Philanthropy, 2016)

Motivations vary by race and ethnicity. For example, African American and Hispanic donors are more likely than the general population overall to be motivated by faith, and Asians are much less likely than the general population to be motivated by faith. Causes that are important also vary. While children's charities, healthcare, and human rights receive similar levels of support across racial and ethnic groups, Asians are less focused on giving to places of worship and much more focused on emergency relief and educational organizations than other groups. African Americans are almost twice as likely as other groups to support organizations that help the elderly, victims of crime or abuse organizations, and organizations that fight hate, prejudice, and inequality. Hispanics are three times as likely as other groups to support immigrants and refugee rights. The most important takeaway in research about how and why donors give, however, is that "majorities across all sub-groups believe it is important to support nonprofit organizations." This impulse to help those in need is not new nor emerging among any racial, ethnic, or other minority groups. (Blackbaud's Diversity in Giving, 2015)

Labeling major giving among diverse populations as 'new and emerging' is misleading and too often leads to ignoring large numbers of potential donors. As Professor Freeman adds—and his remarks are relevant across other diverse populations—donors of color may be an untapped market for a particular organization, but "that says more about the organization than the donors. It says the organization has little history of meaningfully and consistently engaging these donors on their own terms—a difficult admission to make, but a step in the right direction." (Freeman, 2018)

Assumption: Established approaches to fundraising will work for all potential donors.

Tried and true fundraising practices involving competition, deadlines, recognition, board positions, and peer pressure were designed decades ago by organizations whose prototypical donor was a white, heterosexual male. Our Aspen Leadership Group colleague Kathleen Loehr points out these fundraising practices are "seared into us," with lessons about raising money primarily from white men becoming codified skills required in the advancement profession. Despite documented differences in the way non-white-male donors give, "we often still apply the same approach to most donors, regardless of age, gender, or ethnicity." (Loehr, 2018)

"Affluent, high-net-worth, and ultra-high-net-worth individuals are present in every racial and ethnic community," say Urvashi Vaid and Ashindi Maxton in their recent report, "The Apparitional Donor: Understanding and Engaging High Net Worth Donors of Color." (Vaid and Maxton, 2017, p.2). They offer several insights based on existing research:

- Giving practices are different from one community of color to another and unlike the philanthropy of high net worth Caucasian donors.

- Rather than simply asking donors to join largely Caucasian networks, fundraising leaders should consider starting from where donors of color are already networked and building from there. Also, they should consider connecting donors across racial lines by focusing on common interests and passions.

For instance, the National Museum of African American History and Culture (NMAAHC) successfully raised over $540M from a very diverse donor base. Museum Director Lonnie Bunch said the campaign sought diversity in its supporters, just as it does in its staff and volunteers. "I have the most diverse staff of any museum in America, and we have a diverse council," he said. "If this is the quintessential American story, I want all Americans to help shape it." The diversity of the supporters is also remarkable. African Americans represent 74% of the individuals who each gave $1 million or more, officials said, a figure almost double their early expectations. And African American organizations represent 28% of institutional support for the museum, including black sororities, fraternities and civic groups." (McGlone, 2016)

Blackbaud's 2015 report, "Diversity in Giving," found that African American and Hispanic donors say they are solicited less frequently, and that they would give more if they were asked more often.

We need much more understanding of diversity in why and how people give, and we need to be prepared to respond to that diversity. For example, while varying racial and ethnic groups respond to direct mail and fundraising events in similar proportions, Hispanics and African Americans are more likely than other groups to respond to a street canvasser or to a television advertisement requesting a donation. Asians are twice as likely as African Americans to give through a website. Attitudes about giving also vary considerably, with Caucasians paying more attention than other groups to planning their giving and to organizational overhead, and Hispanics and African Americans saying twice as often as other groups that they'd give more but don't know how (Blackbaud's Diversity in Giving, 2015). Such studies are only scratching the surface of information fundraisers will need if they are fully to engage all of the donors with potential to support their organizations.

Fundraisers also need a better understanding of when and how identity will play a role in the fundraising process. Aaker, Akutsu, and Liu (2009) found there were three different identities people claimed when asked why they give: familial identity, community or social identity, and personal identity.

The Blackbaud study found that "donor priorities, values, and habits differ somewhat as we look at specific ethnic or racial donor sub-groups. In most cases the differences are subtle. In a few cases they are significant. In all cases, they are useful pointers toward a more inclusive approach to fundraising." (Blackbaud's Diversity in Giving, 2015)

The color of a person's skin is not a significant predictor of giving amount. Nor is age, education, or how long they have lived in this country. What does drive how much a donor gives is that person's connection to faith or house of worship. The amount a person gives in total dollars maps to total income... as long as the fundraising community remains disproportionately white, we

are unlikely to reach all Americans who are waiting—and wanting—to help those in need. (Blackbaud's Diversity in Giving, 2015)

Successful fundraising leaders know that one-size-fits-all fundraising does not work—even among their white donors. Yet they have not gone far enough in reexamining established practices as they attempt to engage more and more diverse potential donors.

4. False assumptions related to the pipeline of talent reduce diversity in teams

Assumption: There aren't enough qualified diverse advancement professionals

Just as with myths about diversity among donors, myths about diverse talent in the advancement profession are destructively self-perpetuating. The advancement profession, like most professions, needs continued creative thinking about building pipelines of diverse talent. Qualified people are hard to find in general, yet a variety of additional barriers—many unconsciously self-imposed—make identification and recruitment of diverse professionals an even greater challenge for many leaders. Attention to these barriers—through awareness and informed action—greatly lowers those barriers, busting unproductive myths, and creating an upward spiral in success of recruitment and retention efforts.

There are many barriers, but two of the most important are:

• Implicit biases

• Threshold requirements that unnecessarily restrict hiring

What is implicit bias? IB refers to personal experiences, culture, background, attitudes, and stereotypes that affect our understanding, action, and decisions in an unconscious manner. All of us use mental shortcuts based on social norms and stereotypes that are not necessarily aligned with our declared beliefs or may not even reflect stances we would explicitly endorse. Nonprofit hiring managers often overlook qualified candidates as a result of their unintentional biases.

Some hiring managers and search firms focus on making sure there is at least one diverse candidate in a pool, but implicit bias may in some cases play more of a role when only one diverse candidate is included, potentially leading search committee members unconsciously to view the one diverse candidate in the pool as even more "unusual" or more of an anomaly because they are the only one in the pool. In 2016, Harvard Business School published an article, stating, "If there's only one woman (or minority) in your candidate pool, there's statistically no chance she'll be hired." (Johnson, Hekman, and Chan, 2016) The research, focused on faculty hiring, showed that if a pool includes three candidates and one is a woman or minority, there's statistically no chance that the one woman or

minority will be hired. However, if just one additional woman or minority is added to the candidate pool, the chances of a women or minority being hired dramatically increase:

- If there are **2 women** in the pool the odds of hiring a woman are **79% greater.**

- If there are **2 minorities** in the pool the odds of hiring a minority are **193% greater.**

"BECAUSE WE OFTEN THINK OF BIAS AS A FUNCTION OF OVERT ACTS OF BIGOTRY, WE CAN SOMETIMES REMAIN BLIND TO THE INVISIBLE STRUCTURES, SYSTEMS, AND BEHAVIORS THAT BESTOW AND REINFORCE THAT POWER AND PRIVILEGE ON A DAILY BASIS." (ROSS, 2014)

When it comes to threshold requirements, hiring organizations often include requirements beyond those necessary for a position, often simply because the position description begins with a template of generic requirements that are not carefully considered, item by item, for applicability to a specific job. For example, nonprofits reflect too little on whether a specific degree is truly required for success in a position, using a bachelor's degree and even an advanced degree as a threshold requirement, not to mention the type of institution from which it was acquired. Candidates without the degree but

with highly relevant experience will be overlooked or often will not even apply. All requirements should be examined for relevance—are they truly required, or are they there simply because they appeared in the template or in the job description the last time it was posted? Is it possible that certain experiences would be at least as important to success in the position as whatever qualification comes along with a degree?

Alisa Smallwood, CFRE, Vice President for Development, Grady Health Foundation says, "Sometimes there's no intentionality around hiring diverse talent, and it's critically important in healthcare philanthropy. There are numerous advantages to having a diverse team, especially given the various nuances to major gift fundraising." She adds:

"WE NEED TO ASK OURSELVES, 'ARE WE A REFLECTION OF THE COMMUNITY WE SERVE?' AND IF NOT, WHAT INNOVATIVE IDEAS AND APPROACHES TO OUR WORK ARE WE UNINTENTIONALLY SACRIFICING?"

Assumption: Diverse professionals who stay in the nonprofit sector do not have the skills to be competitive for top leadership jobs

According to the report "Race to Lead: Confronting the Nonprofit Racial Leadership Gap," the gap in racial leadership "isn't about education, ambition, or qualifications." (Thomas-Breitfeld and Kunreuther, 2017) People of color and white respondents have similar backgrounds in education, position,

salary, and years working in the nonprofit sector. Those aspiring to leadership roles reported that they had the qualities needed to be a good leader. They reported few differences in the areas of financial skills, goal setting, articulating a vision, advocacy, and collaboration. "Talented, ambitious, and qualified people of color are ready to lead, but they are thwarted by assumptions about race, the idea of 'cultural fit,' and preconceived notions of what a leader looks like." The report includes more detail than can be included here, and the authors highly recommend the entire report.

Similar assumptions have been made based on gender, age, sexual orientation, disability, and other factors, holding back many highly-qualified advancement professionals from the top jobs.

---

5. Knowledge is not enough to change behavior

Knowledge is important, but if it were sufficient, the world of philanthropy would have seen much more progress in the area of diversity and inclusion.

Example 1: Boards and CEOs

- According to a 2017 report from Board Source, which represents a broad cross-section of the nonprofit sector, 90% of nonprofit chief executives are white, 90% of nonprofit board chairs are white, and 84% of nonprofit board members are white. Yet only 65% of CEOs are dissatisfied with racial and ethnic diversity in leadership, and only 41% of board chairs are dissatisfied.

- In 2015, 25% of nonprofit boards were 100% white. In 2017, 27% of nonprofit boards were 100% white.

- Dissonance between attitudes and actions: Of organizations with zero people of color on their boards, 62% of executives say the board's racial and ethnic diversity is greatly important or important to increasing the organization's ability to advance its mission, but only 10% of executives report that demographics are a high priority in board recruitment. (Board Source, Leading with Intent, 2017)

Keith R. Tribble, President and Chief Executive Officer of the Jackson Health Foundation (JHF) says, "JHF's Board is not as diverse as we want it to be. Just because we're in Miami does not mean that we do not have to work hard for diversity." He continues by sharing how JHF had to create a three-to-five year strategic plan to address diversity on their board, in addition to developing a diversity demographic grid along with aggressive networking strategies to reach diverse board members (i.e. age, ethnicity, gender, etc.). Tribble adds:

"SIMPLY PUT, IF I'M LOOKING FOR A HISPANIC BOARD MEMBER, I'M NOT GOING TO ASK MY FRIEND WHO'S AFRICAN AMERICAN. I'M GOING TO FIND LEADERS IN THAT COMMUNITY, DEVELOP A STRATEGY, AND MAKE IT HAPPEN."

Example 2: Analysis and Accountability

- According to a 2016 report, "Advancing Diversity in the Nonprofit Sector,"

produced by Public Allies, an organization that supports aspiring leaders in the social-service sector, while 68% reported that their organizations value diversity, only 22% had done a diversity audit of any kind. "This reflects a lack of awareness of what practices should be reconsidered or changed to advance diversity and inclusion," said the report. Furthermore, while 50% believed their organization's CEO to be a bold champion of diversity, only 28% said that leader was held accountable for diversity goals. (Singh and Antigua, 2016)

Example 3: Effectiveness

- In a 2017 report from Vetted Solutions surveying the associations sector, 81% of respondents view diversity and inclusion as part of their association's core values, yet 45% said they do not yet have an action plan for implementing diversity and inclusion initiatives.

- 73% have comprehensive diversity and inclusion policies within their association, yet 70% do not believe they have effective benchmarks or measures to evaluate the impact of their efforts.

- 84% say they focus on diversity because it's "the right thing to do." Only 19% say it's "helpful to our profitability." (Rehr and Zaniello, 2017)

In some cases, knowledge cannot be obtained simply through training. According to the Institute for Diversity in Health Management's benchmarking study, 79% of hospitals require employees to undergo cultural competency training to gain a better understanding of other cultures (Institute for Diversity in Health Management, 2015). But Fred Hobby, former President and CEO of the Institute for Diversity, argued that intimate knowledge of a culture cannot be taught. Having diverse leadership and staff is a better way to reduce disparities. (Livingston, 2018)

The three examples above demonstrate that knowledge—in some cases knowledge over decades—has not been sufficient to change behavior and action that leads to sustained progress. To achieve lasting results, brave conversations and genuine commitment to change are required.

Begin with Brave Conversations and a Commitment

Start having brave conversations about diversity with your teams and as a leader. It's okay to be uncomfortable.

Equipped with knowledge, nonprofit professionals and volunteers need to engage in courageous conversations about 1) why diversity is essential to fundraising success, 2) how our biases—many of them unconscious—create barriers to progress, and 3) how important change in the composition and behavior of leaders is to sustained improvement in diversity, equity, and inclusion.

Nonprofit leaders are reluctant to accept that their organizations are falling short in the area of workplace diversity.

"Seeing themselves as doing good work in the world sometimes makes it difficult to admit that they're not doing good work in this part of the world," says Martin Davidson, a University of Virginia professor of business administration who researches how diversity improves organizational performance. "The organization can get defensive." (Koenig, 2016) The research we reviewed, and our experience, make exceptionally clear that progress in diversity requires an environment that welcomes open, honest, and often difficult discussion.

In such an environment, leaders should then use data to create awareness—for themselves, and for their colleagues. As attention to diversity, equity, and inclusion is increasing in nonprofits across the country, research and data are also increasing. We have cited several reports, and we encourage all leaders to seek out others, and to add to the body of knowledge by studying their own organizations and constituencies.

When organizational leaders know what to look for, and when they take the time for focused research and conversation with knowledgeable partners, they will have sufficient information to set themselves on an entirely different trajectory of success in identification, engagement, and retention of a much more diverse group of donors and staff members.

"TACTICAL TWEAKS WON'T GET US WHERE WE NEED TO GO. THE CHANGES WE NEED ARE MORE FUNDAMENTAL THAN THAT." (BLACKBAUD'S DIVERSITY IN GIVING, 2015)

1. Why is diversity important to you?

Too many efforts at diversity fail because the motivating reason behind diversifying staff and the donor base is that "it's the right thing to do." For diversity efforts to succeed, leaders must first understand and agree that diversity is critical to mission fulfillment. Each organization is different, and leaders must take into account the audiences being served and the breadth of experience and perspective required among staff members, volunteers, and donors to deliver the very best service to those constituents. The diversity required for success will likely go well beyond racial, ethnic, and gender diversity and may include age, sexual orientation, physical ability, the understanding of different geographical areas, creative abilities, and so on. Organizational leaders with a shared understanding of why diversity is important to the success of the business will create the most sustainable change in systems and behaviors and create a truly inclusive environment.

2. Implicit bias

Implicit bias shows up daily, in all parts of our lives. Our viewpoints are guided by our own individual upbringing and experiences. All of us have implicit bias, but most of us are not conscious of this bias. The first step to meaningful change is awareness.

Training for hiring panels and search committees reduces bias, in large measure by helping members

understand something of which they were previously unaware. IB training will have an impact far beyond recruitment efforts—awareness and associated reduction in bias will lead to a more inclusive environment and will also strengthen interactions with current and prospective volunteers and donors.

Awareness leads to understanding, understanding leads to change in behavior, and change in behavior creates an inclusive environment in which all donors, volunteers, and team members fully contribute to and participate in success.

---

3. Composition and accountability of leaders

In the Race to Lead study, respondents across race squarely identify the lack of people of color in top leadership roles as a structural problem for the nonprofit sector. (Thomas-Breitfeld and Kunreuther, 2017) People of color reported lack of role models and lack of networks as challenges and frustrations in their own career advancement to a much greater degree than Caucasians. Race to Lead's overall conclusion: To increase the number of people of color leaders, the nonprofit sector needs to **address the practices and biases of those governing nonprofit organizations**. Rather than focus on the perceived deficits of potential leaders of color, the sector should **concentrate on educating nonprofit decision-makers on the issues of race equity and implicit bias accompanied by changes in action leading to measurable results**.

This is required for all diverse populations.

In order to create sustainable change, leaders need to:

- Make diversity an explicit priority and ensure that leaders hold each other accountable.

- Ensure that all leaders understand and advocate for the organization's definition of diversity, equity, and inclusion.

- Acknowledge and reward inclusive managers.

- Set diversity goals for the board and the executive leadership team.

- Conduct a diversity assessment so that everyone in the organization understands the current state of diversity.

- Set measurable diversity goals for the organization, including hiring and retention goals as well as goals for increasing employee engagement and creativity.

- Integrate diversity training into leadership and professional development programs.

- Empower and hold accountable leaders at every level of the organization, not only at the top.

"When leaders take a strong stand and persuasively declare the change they wish to see, their compelling vision can pull others in the organization into new behaviors, conversations, actions, and processes." (Loehr, 2018)

Loehr encourages that leaders then "rumble" with what they are learning. She encourages them to assemble a diverse group—including staff as well as donors—to study the research and discuss what they are learning. The goal, says Loehr, is "a village of people… from the leader on down…who are now curious, can ask questions, are engaged…and will work with you to design ways to connect differently with diverse donors. Attention and awareness are no small outcomes. They are the beginning we need to build fundraising practices that resonate with diverse donors." (Loehr, 2018)

Strategies for Success in Talent Development and Management

"NEVER BELIEVE THAT A FEW CARING PEOPLE CAN'T CHANGE THE WORLD. FOR, INDEED, THAT'S ALL WHO EVER HAVE." - MARGARET MEAD

Effecting change is hard, and it can be overwhelming. Here are some suggestions for steps that will create sustainable change. The first few require significant discussion across leadership, but many of the others can be implemented by one hiring manager, setting an example for others to follow and, ideally, creating a ripple effect throughout an organization.

---

1. Define diversity, equity, and inclusion for your organization, and specifically for advancement

Establish an organizational diversity, equity, and inclusion statement if one does not exist; update it if it does. Create a DEI statement for advancement that addresses the entire community of volunteers and donors, as appropriate.

Defining Diversity, Equity, and Inclusion: (D5 Coalition)

Diversity: a value that brings unique perspective or life experience to the decision-making table, with a focus on ensuring the inclusion of racial and ethnic groups, LGBTQ populations, people with disabilities, and women.

Equity: promoting justice, impartiality, and fairness within the procedures and processes of institutions or systems, as well as in their distribution of resources.

Inclusion: refers to the degree to which individuals with diverse perspectives and backgrounds are able to participate fully in the decision-making processes of an organization or group. While a truly inclusive group is necessarily diverse, a diverse group may or may not be "inclusive."

A clear, shared understanding of what the organization means in using these words is an important factor in taking action and measuring progress.

2. Devote resources to diversity

Devote people and operating budget dollars to training, onboarding and retention programs, professional development, partnerships with consultants and associations focused on diversity, and other actions that demonstrate commitment to diversity and change behaviors in sustainable ways.

"Donors are often motivated to support organizations because they believe in the mission, feel they have a responsibility to give, and believe their gift can make a difference," says Tara A. Black, Director of Philanthropic Resources, The University of Texas MD Anderson Cancer Center. "These motivations are no different for "diverse" donors. There are false assumptions that "diverse" donors don't understand philanthropy and are not philanthropic. This is often perpetuated by fundraisers who lack adaptability and who lack cultural awareness. Fundraisers must have the ability to connect with donors who don't always look like them or share in their same beliefs and values. Cultural awareness training and promoting diversity in hiring fundraisers can help improve fundraising outcomes with all groups of donors."

3. Train hiring managers and hold recruiters to the same standard

Implicit bias is just that – we all have it, and in many cases, we are not aware. All search committees need to be trained in implicit bias. Work with recruiters who train their search consultants as well. If you find yourself or your colleagues rejecting a candidate because they are "not a good fit" without being able to point to specific shortcomings in skills, ask yourself whether implicit bias is keeping you from making the best hire. Avoid using the term "right fit" and articulate clearly the knowledge, skills, and ability needed for each position and candidate.

4. Pay careful attention to job descriptions, requirements, and postings

Include diverse-candidate-friendly, inclusive language throughout the position description, in addition to including your diversity, equity, and inclusion statement. Explain why diversity is important to your organization and how the organization has made diversity and inclusion a priority. Talk about diversity goals and objectives, so candidates can understand and make you aware of ways in which they might contribute to progress toward these goals. If diversity is truly a goal, make it a preferred qualification. Consider questions such as: Is experience an acceptable substitute for a degree? Is remote work possible for someone with a disability? Ensure that search committee members, search consultants,

and advertising reach diverse networks—which may mean moving beyond comfortable, personal networks.

5. Don't just tell – show

In recruitment efforts, ensure that search committees and everyone involved in a search show that diversity is a priority. Ensure that search committees are diverse not only in job function but also in gender, race, ethnicity, age, sexual orientation, ability, and other ways. Organizations that talk about the importance of a diverse workforce and then assemble a non-diverse search committee are not credible.

Showcase diversity on websites (i.e., staff directory, volunteer boards, marketing materials, etc.) in imagery and voices included, and highlight specific diversity initiatives.

6. Don't just show – tell

Talk about diversity goals and objectives in interviews, ask about candidates' experience with and commitment to diversity, be candid about the organization's challenges related to diversity, and allow space in the interviewing process for diverse candidates to learn what they need to know and what matters most to them and their families as they make a decision about the position. Add space for transparent conversations.

"The person looking for a job often is relatively sophisticated about diversity," says Professor Martin Davidson. "They can walk into the office and see there's not much diversity here. The capacity of the hiring entity to be upfront about why diversity is important and what they're doing to try to create diversity is usually a very strong selling point." (Koenig, 2016)

If diversity in the search committee is not possible, be transparent about diversity goals, so that diverse candidates understand the role they might play in advancing the organization's diversity objectives and fulfillment of the organization's mission as a result. Hundreds of diverse candidates have told us of two very different categories of interviewing experience. In the first—by the far the most common—they quickly feel that they are in a pool because of their gender or the color of their skin, helping an organization check a box related to the search process, or, at best, check a box in terms of hiring goals that feel like quotas. They find that these organizations are not at all ready to talk about all that the candidate brings to the table—including diversity—that will help the organization advance specific diversity goals and advance its overall mission fulfillment.

In the second scenario, which happens too rarely, they hear a consistent story about an organization's diversity objectives, challenges meeting those objectives, and exciting opportunities associated with those objectives. They can then make informed decisions about the contributions they can and want to make. All hiring managers and recruiters do well to understand that diverse candidates have become highly educated in seeing through statements about diversity that are not backed up by substance.

In many respects—and diversity is no exception—candidates rarely fear a challenge. Diverse candidates may be ready and willing to join an organization even when that organization has a long way to go in meeting diversity and inclusion goals. They are, however, afraid of what they don't know. They won't know leaders and colleagues are genuinely interested in diversity and inclusion unless they hear it—the good, the bad, and the ugly! Be open and honest about your challenges, and you will be much more likely to find someone who will join you on a journey to real and lasting impact.

---

7. Sponsor and Mentor

Many successful leaders credit a portion of their success to their mentors and sponsors. Mentors provide critical personal and professional guidance and advice, often over the course of a career. Sponsors act on someone's behalf, often without the beneficiary even knowing. (Petland, 2015)

The Center for Talent Innovation, in its 2019 report, "Sponsor Dividend," found that "Having a sponsor—someone ready to deploy relationship capital on your behalf—confers a significant career boost on a protégé...For professionals of color, winning a sponsor can have an even more critical impact, particularly when it

comes to retention. As companies devote enormous sums to attracting talented women and employees of color, sponsors can ensure that employers make good on their initial recruiting investment." (Center for Talent Innovation, 2019)

---

8. Measure

Establish measurable diversity goals, then track progress. Start with simple, clear, sustainable, and achievable goals, and build from there. Without intentionality and consensus, colleagues will fall back on excuses, and wins will be short-lived.

Summary

Embracing diversity, achieving equity, and being inclusive are essential to success in advancement. We all have biases that make progress in diversity, equity, and inclusion challenging work. Our organizations have established practices that have shown success for many years; re-examining these practices, and changing those that limit engagement and fundraising results, is unsettling and even frightening—as is all change. Yet the field of advancement is all about improving the capacity of nonprofit organizations to fulfill their missions, and that improvement demands the deepest and broadest possible engagement. Diversity, equity, and inclusion in advancement programs is a business imperative. Those with courage to face their biases and embrace and lead change will engage more constituents and raise more money.

References

Hunt, V. Layton, D. and Prince, S. (2015). Why diversity matters. Retrieved from McKinsey & Company: https://www.mckinsey.com/business-functions/organization/our-insights/why-diversity-matters

Troiano, E. (2013). Why Diversity Matters. Retrieved from Catalyst https://www.catalyst.org/research/why-diversity-matters/

Blackbaud Institute for Philanthropic Impact. (2015). Diversity in Giving. Retrieved from https://institute.blackbaud.com/asset/diversity-in-giving/

U.S. Trust and The Indiana University Lilly Family School of Philanthropy. (2018).

2018 U.S. Trust Study of High Net Worth Philanthropy. Retrieved from https://www.privatebank.bankofamerica.com/articles/2018-us-trust-study-of-high-net-worth-philanthropy.html

Freeman, T. (2018, August 13). Donors of Color Are Not 'New' or 'Emerging.' We've Been Giving All Along. Retrieved from Chronicle of Philanthropy: https://www.philanthropy.com/article/Opinion-Donors-of-Color-Are/244252

Loehr, K. (2018, October 2). Fundraising Is Stalled by Its Focus on What Works for White Men. Chronicle of Philanthropy. Retrieved from https://www.philanthropy.com/article/We-Won-t-Raise-More-Money/244651

Vaid, U. and Maxton, A. (2017). The Apparitional Donor: Understanding and Engaging High Net Worth Donors of Color. Retrieved from http://thevaidgroup.com/wp-content/uploads/2017/05/FinalAppDonreport4.17.pdf

McGlone, P. (2016, August 5). The Largest Private Donations to the National Museum of African American History. The Washington Post. Retrieved from https://www.washingtonpost.com/classic-apps/the-largest-private-donations-to-the-national-museum-of-african-american-history/2016/08/05/6dd47488-542f-

11e6-bbf5-957ad17b4385_story.html

Aaker, J. and Akutsu, S. (2009, June 26). Why do people give? The role of identity in giving. Retreived from: https://doi.org/10.1016/j.jcps.2009.05.010

Johnson, S., Hekman, D., and Chan, E. (2016, April 26). If There's Only One Woman in Your Candidate Pool, There's Statistically No Chance She'll Be Hired, Harvard Business Review. Retrieved from https://hbr.org/2016/04/if-theres-only-one-woman-in-your-candidate-pool-theres-statistically-no-chance-shell-be-hired

Ross, H. (2014). Everyday Bias: Identifying and Navigating Unconscious Judgments in Our Daily Lives. Rowman & Littlefield.

Thomas-Breitfeld, S. and Kunreuther, F. (2017). Race to Lead: Confronting the Nonprofit Racial Leadership Gap. Retrieved from http://racetolead.org/race-to-lead/.

Board Source, (2017). Leading with Intent: 2017 National Index of Nonprofit Board Practices. Retrieved from https://leadingwithintent.org/wp-content/uploads/2017/11/LWI-2017.pdf.

Singh, P. and Antigua, M. (2016). Advancing Diversity in the Nonprofit Sector: Voices of Public Allies Alumni. Retrieved from Public Allies: https://drive.google.com/file/d/0B1P6fXXLQOora3M4RmhuTHo5Nmc/view.

Rehr, D. and Zaniello, J. (2017). Diversity and Inclusion Core Values Among Associations. Vetted Solutions. Retrieved from: http://www.vettedsolutions.com/Sources/Diversity_and_Inclusion%E2%80%93Core_Values_Among_Associations.pdf.

Livingston, S. (2018, October 13). Fostering diversity for the next generation of healthcare leaders. Retrieved from Modern Healthcare: https://www.modernhealthcare.com/article/20181013/NEWS/181019970/fostering-diversity-for-the-next-generation-of-healthcare-leaders.

References

Institute for Diversity in Health Management. (2015). Diversity and Disparities: A Benchmarking Study of U.S. Hospitals in 2015. Retrieved from http://www.diversityconnection.org/diversityconnection/leadership-conferences/Benchmarking-Survey.jsp.

Koenig, R. (2016, March 3). How — and Why — to Hire a Diverse Nonprofit Staff. Retrieved from Chronicle of Philanthropy: https://www.philanthropy.com/article/How-Why-to-Hire-a/235570.

D5 Coalition. What is DEI? Retrieved from http://www.d5coalition.org/tools/dei/

Petland, L. (2015, October 2). Mentorship vs. Sponsorship, And How to Maximize Both. Retrieved from Forbes Leadership Forum: https://www.forbes.com/sites/forbesleadershipforum/2015/10/02/mentorship-vs-sponsorship-and-how-to-maximize-both/#1c44a8c72435.

Center for Talent Innovation. (2019, January 8). Sponsor Dividend. Sponsored by American Express, Bank of America, Crowell & Moring LLP, Ernst & Young LLP, Freddie Mac, Interpublic Group, Johnson & Johnson, Macquarie Group. Retrieved from: https://www.talentinnovation.org/publication.cfm?publication=1640.

ASPEN LEADERSHIP GROUP

At the Aspen Leadership Group, we believe that an organization's capacity to reflect and respond to the rich diversity of our society profoundly impacts its ability to fulfill its mission. Accordingly, we are committed to fostering, cultivating, and preserving a culture of diversity and inclusion, both in our own company and in partnership with our clients and the individuals we serve.

ALG's diversity, equity, and inclusion services include, among others:

- DEI Audits and Assessments
- Implicit Bias and DEI Training for Hiring Managers and Search Committees
- Women's Philanthropy Consulting
- Strategic Thought Partnership
- Leadership Coaching & Counseling
- Multicultural Constituency Engagement
- Diversity Talent Partnership