DIVERSITY AND INCLUSION
IN THE FOUNDATION BOARDROOM

VOICES OF DIVERSE TRUSTEES

TRANSFORMING MICHIGAN
PHILANTHROPY THROUGH
DIVERSITY AND INCLUSION
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Among the most far-reaching and important work ever done on diversity and inclusion.

—Lawrence T. McGill

A UNIQUE EXPERIMENT

Launched by CMF in 2008, Transforming Michigan Philanthropy through Diversity & Inclusion was conceived as a catalyst for positive social change that would transform Michigan communities by increasing the effectiveness of organized philanthropy in our state. It is the only comprehensive, statewide effort to promote diversity and inclusiveness among foundations.

Objectives:
1. For CMF to become a diverse and inclusive membership association.
2. To increase member awareness and understanding and to support voluntary action to become more diverse and inclusive.
3. To increase the diversity of individuals serving, leading, governing, and advising foundations and corporate giving programs.

Lawrence T. McGill, vice president for research at the Foundation Center, has called the initiative's research and data gathering "among the most far-reaching and important work ever done on diversity and inclusion." Other TMP resources, including findings on Michigan foundations’ policies and demographics, may be accessed at www.michiganfoundations.org.

Support for the TMP initiative has been provided by the Arcus Foundation, The Kresge Foundation, W.K. Kellogg Foundation, C.S. Mott Foundation, and The Skillman Foundation.
INTRODUCTION

In March of 2009 an unusual group of people met to talk about their experiences serving as trustees of community, family, and independent foundations in Michigan. Fourteen volunteer leaders, ranging in age from 35 to 75, participated in two focus groups conducted by the Council of Michigan Foundations (CMF) and BoardSource. Not one of them fit the typical foundation boardroom demographic in our state: white (80 percent), male (60 percent), and age 50 or older (66 percent).

But this diverse group of trustees represented what CMF and other sector leaders believe will be the future face of foundation boards: one that’s more reflective of the communities those foundations serve.

As part of CMF’s six-year initiative, Transforming Michigan Philanthropy Through Diversity and Inclusion (TMP), we asked these “outliers” to share their boardroom experiences and thoughts on how foundations can build more representative and inclusive boards. The participants were candid and direct, sharing their passion for equity through anecdotes and personal reflections on their roles as change agents. In the report that follows, you’ll read their stories of struggle and achievement, mistakes made and lessons learned.

Diversity & Inclusion in the Foundation Boardroom: Voices of Diverse Trustees is the second in a series of reports produced by CMF as a part of its TMP initiative. The first report, Building Diverse and Inclusive Foundations: Lessons from Michigan, focused on the roles and experiences of foundation CEOs in making diversity and inclusion a reality.

This report presents the practical knowledge and experiences of diverse individuals who have served on foundation boards over the last two decades. Their insights provide a compelling context for foundations seeking to build diversity and create an inclusive culture within their boards.

To provide a framework for synthesizing the concerns, aspirations, and best practices to be mined from this important conversation, friend and colleague Bill Ryan (researcher and adjunct lecturer at Harvard Kennedy School and coauthor of Governance as Leadership: Reframing the Work of Nonprofit Boards) wrote the illustrative case study that introduces this report. His analysis of one board’s foray into diversity gone wrong is thoughtful and illuminating. His experience and insights inform the discussion guide included with this report: a useful tool for boards undertaking the hard and essential work of becoming more diverse and inclusive in efforts to build social equity.

Our thanks to the trustees who shared their experiences, wisdom, and aspirations; to Vernetta Walker, BoardSource vice president of consulting and training, for her facilitation and ability to create a safe space for real stories to be shared; and to Bill Ryan, for considering the common ground we stand on and his inspiring contributions to this report.

Robert S. Collier  
President & CEO  
Council of Michigan Foundations

Vicki J. Rosenberg  
Former Director and Consultant, Transforming Michigan Philanthropy Through Diversity & Inclusion  
Vicki Rosenberg & Associates
HOW CAN YOU EVEN HEAR ME?
DIVERSITY AND INCLUSION IN THE BOARDROOM

by William P. Ryan

Perhaps no board has done more to advance diversity and inclusion for more people in American society, in less time, than that of Gallaudet University, the world’s premier university for the deaf. And it did so by screwing up.

In 1988, the board mounted a search to select a successor to the university’s retiring president. The search committee brought forward three finalists: two hearing and one deaf.

When the board chose the hearing candidate over the objections of students, faculty, and many alumni, Gallaudet became the scene of one of the most dramatic civil rights actions in U.S. history. Students declared a strike, took over and barricaded the Washington campus for days on end, and defied police with a raucous march to the downtown hotel where trustees were huddled in crisis mode. As the drama played out on national news, the board held firm. In return, and encouraged by swelling public support, the students doubled-down, declaring that their demand for the appointment of the university’s first deaf president was nonnegotiable. They won: The new president was dismissed (having never set foot in her office) and the board chair resigned. Within months, Congress enacted the Americans with Disabilities Act. Credit for the final push toward passage is widely given to what has ever since been called the Deaf President Now! movement. However unwittingly, the board had been the catalyst for the breakthrough.

Beyond thanking the board for that unintended contribution to social justice, we can look to it for lessons about diversity and inclusion in the boardroom.

Diversity

Most boards aspire to diversity along at least some dimensions—be it age, gender, constituent status, or race or ethnicity. For many, building a diverse membership demonstrates their commitment to fairness and equity. And most hope that the varied life experiences and perspectives of diverse members will have the practical benefit of enriching a board’s thinking and helping it make better judgments.

That’s why most students of governance react to the Gallaudet case by first asking whether its board included any deaf people or students, and are surprised to learn that the answer, to both, is Yes. Others worry (as I do) that boards—having “checked the diversity box” by including the “right” members—can relieve themselves of the important work of engaging with diverse constituents outside the boardroom. They suspect that that was Gallaudet’s misstep. But in fact, the search committee engaged both students and faculty through a careful consultation process (which initially revealed no insistence for the deaf candidate). If a diverse board consulting diverse constituents isn’t enough, what is?
Diversity Plus Inclusion

The “right people” might be in the room, but the norms and practices needed to draw them into meaningful, inclusive dialogue can be missing. This is no surprise to anyone who has spent much time in boardrooms. Barriers to robust dialogue—characterized by multiple voices and lines of thinking—are common, even for boards that are indifferent to diversity. The challenge is all the greater when the social dynamics and subtle unconscious biases of “majority” and “minority” board members are added to the mix. In the Gallaudet case, a few deaf trustees working alongside hearing trustees may be evidence of diversity, but not necessarily inclusion.

How does a board become inclusive?

Individual board members have a role, starting with developing their awareness. Most of us have heard (hopefully less often now than 30 years ago) women recount a classic boardroom scene: A woman contributes an insight to the conversation; it is not picked up for discussion; a man makes the same point moments later; it is then admired and taken up for lively discussion. If we’re not aware of such dynamics, we can’t guard against them. It’s one thing to seat women on a board, another to encourage them to speak, but something else to listen. Each of us can work to listen more deeply to what others are trying to say, and reflect on how others might hear us.

Gallaudet provides an apt parable. At the height of the crisis, the chair stood before hundreds of students in a crowded gymnasium and defended—through the sign interpreter at her side—the board’s decision. When students angrily responded by chanting, jeering and, finally, pulling a fire alarm in protest, she plaintively asked: “How can you even hear me with all this noise?” Her question spoke volumes, and the students heard all of it.

Luckily, there are also very practical ways to promote inclusion in robust board dialogue. Small groups, paired debriefs, balloting-by-dot on flip charts—all the familiar techniques we use at board retreats—can also vastly improve dialogue at routine board meetings. These techniques are especially good at including voices that might otherwise be at the margins. They promote more engagement, a richer exchange of ideas, and more divergent thinking. Unfortunately, many boards resist using these techniques. They complain they are gimmicky, beneath the dignity of their sophisticated members. One can only speculate whether a board like Gallaudet’s—whose members were all sophisticated and experienced leaders in their own professions—would have tolerated such techniques in their search deliberations. And one can only speculate about the conversations they might have had, and judgments they might have made, had they done so.
Diversity Plus Inclusion Plus Inquiry

It’s not enough to get a diverse board engaged in inclusive conversation. The conversation has to be worth having. That means searching dialogue that helps the board make sense of the organization’s situation before deciding what to do about it. Judging from their public statements, the Gallaudet board did ask important questions, particularly—and quite reasonably—about what the university needed from its next president. Fundraising ability and a track record of academic excellence topped the list, and the chosen candidate offered both.

But imagine a prior conversation, focused at first only on generating questions about the university’s situation. Are we devoted to helping deaf people? Or empowering them? What are the biggest debates in the deaf community, and where do we want to stand? Is the role of our president different from the role of other university presidents? If it’s a given that Gallaudet will one day have a deaf president, why not now? What does hiring a hearing president say to the hearing world? To the deaf world? Questions like these help a board grapple with the ambiguities and complexity of their situation. And the struggle to make shared sense of a situation is exactly where a diverse and inclusive board delivers the most value: Multiple perspectives, different voices, generating and struggling with hard questions, will enrich a board’s thinking.

And all of us trying to govern better could start by asking: Are we really any better than the Gallaudet board of 1988? Or just luckier?
PART I: DIVERSITY

“MOST BOARDS ASPIRE TO DIVERSITY ALONG AT LEAST SOME DIMENSIONS—BE IT AGE, GENDER, CONSTITUENT STATUS, OR RACE OR ETHNICITY. FOR MANY, BUILDING A DIVERSE MEMBERSHIP DEMONSTRATES THEIR COMMITMENT TO FAIRNESS AND EQUITY. AND MOST HOPE THAT THE VARIED LIFE EXPERIENCES AND PERSPECTIVES OF DIVERSE MEMBERS WILL HAVE THE PRACTICAL BENEFIT OF ENRICHING A BOARD’S THINKING AND HELPING IT MAKE BETTER JUDGMENTS.” —WILLIAM RYAN

The trustees who participated in the TMP focus groups represented Michigan foundations with a commitment to advancing diversity in their organizations and the communities they serve. These board members spoke appreciatively of established policies regarding diversity and efforts to recruit people representing different races and ethnicities. Some also related the loneliness they felt on boards where they were one of only one or two persons of color. Miles Wilson, a trustee with the Nokomis Foundation, said that having served on many boards over the years, he has found it challenging to be “consistently among the few.” It’s a “really isolating experience,” he explained, to serve on a board where so few represent any “diversity of thought and experience.”

Studies examining the racial and ethnic demographics of U.S. foundations and nonprofits indicate that board leadership is not keeping pace with an increasingly multiracial population. Vernetta Walker, BoardSource vice president of consulting and training, opened the focus group discussions with some discouraging findings from the BoardSource Governance Index¹, indicating that the racial and ethnic composition of boards changed only slightly in the 17 years between 1993 and 2010, despite rapidly changing demographics in the U.S. population.

According to the most recent State of the Work² report published by the D5 Coalition in 2012, the demographics of U.S. foundation leadership—executives and trustees—reflect neither the nation’s overall diversity nor that of its workforce. The Coalition’s 2011 Base Line Analysis found that “people of color make up 37 percent of program officers at foundations and 21 percent of the U.S. management/professional workforce, but only 10 to 17 percent of CEO and board leadership at foundations.” And that while women make up 73 percent of program officers, and 70 percent of executive staff, “they’re underrepresented in the boardroom, constituting only 38 percent of trustees.”

“I don’t want to be back here in ten years, looking at the same numbers and having the same conversation. We need to determine what boards of nonprofits and foundations need to create a sense of urgency in the sector.”
—Vernetta Walker, BoardSource

The National Gay and Lesbian Task Force estimates that LGBTQ individuals represent 5 to 10 percent of the population, yet only 2 percent of foundation trustees. And, according to 2009 estimates by the U.S. Census Bureau, 12 percent of the population is disabled, but only around 1 percent of foundation board and trustee members are people with disabilities.

At a more local level, CMF and other regional associations of grantmakers in California, Minnesota, New York, and Oregon have been utilizing standardized methods to collect diversity data on foundation staff and trustees within their states. The Michigan Organized Philanthropy Demographic Survey\(^3\), conducted in 2008 by the Community Research Institute at Grand Valley State University for CMF, found that trustees and staff of most foundations in Michigan still do not reflect the changing face of the people they serve.

According to the report, 90 percent of the board chairs and CEOs from respondent Michigan foundations—and the leadership of all responding family foundations—was white. Approximately 33 percent of board chairs were female and 8 percent were black. None of the chairs was Hispanic, Arab American, or Native American. Young people were also under-represented, with only 3.2 percent of Michigan foundation trustees under the age of 30.

That the philanthropy sector should be lagging in the area of diversity was a painful but prevalent irony in the boardroom experiences of several focus group participants. One trustee cited as “another classic example” a social services organization whose clientele is “85 percent individuals of color” and whose 72-person board of directors includes “one diverse trustee. That’s an outrage.”

Speaking of their own organizations’ motivation and effort to diversify, several trustees recalled a board workshop as the initial catalyst for change. Others reported that it was the urging of the CEO or executive director that set the process in motion. A number of community foundations made a financial case for diversity improving the bottom line. “Our change was driven by the need to be profitable in foundation terms,” said one trustee.

Kira Carter-Robertson, a trustee on the board of the Capital Region Community Foundation in Lansing, told the story of an “ah-ha” moment that led to initiating change on their board. “A retired General Motors worker passed away, leaving a large endowment to the foundation. Our board suddenly saw that there was a business case for promoting its work to this whole untapped community of blue collar millionaires who might donate.”

Many of the focus group participants themselves were recruited as part of their foundations’ endeavor to diversify board leadership. While most of the trustees took on their new roles with a sense of optimism, several talked about their initial reluctance to be recruited as a “token” member.

Juanita Bocanegra, a trustee of the Community Foundation of Holland/Zeeland Area, was working full time, attending law school, and raising two young daughters when she was first approached to join the board. Ms. Bocanegra initially declined that offer. “The board approached me again after I graduated from law school,” she said. Bocanegra remembers being worried about being considered a “token.” When she broached her concerns and was assured that the foundation wanted her, not for the sake of “numbers,” but to have the benefit of her voice and opinions, she accepted the job.

Diana Algra, a trustee with Capital Region Community Foundation, related having left previous program work in women’s and minority issues because she felt pigeonholed by her race and gender. “They think that’s the only perspective you can bring: who you are,” she said. In her current position, she feels valued for “offering more,” for everything she brings to the boardroom table.
INTENTIONAL DIVERSITY FOR A FAMILY FOUNDATION

Growing a diverse and inclusive board presents some unique challenges for family foundations, which tend to be made up of people who are related to each other.

For the Flint-based Ruth Mott Foundation, diversity was an essential value but an elusive goal. “The values of inclusivity and hospitality have been the seed for our work as a foundation,” says Board Chair Maryanne Mott, daughter of the foundation's founder. “The importance of diversity and inclusion in our foundation came from my mother’s values and has always been a part of our history.”

But while the Ruth Mott Foundation “made a very explicit decision to have non-family members on the board, most of them people of color,” progress toward diversity was limited by the number of trustee slots available. The disconnect between board culture and the community it serves was spotlighted when an African American woman who worked on grantmaking for the foundation declined a grant request from a well known Flint organization because it “lacked diversity,” Mott says. “The demographics of the Flint community had changed over time, yet this organization had not evolved to meet those needs.”

When the grant-seeking organization reworked the proposal to address the growing needs of the community, Mott recalls, “they had done such a good job in their programming that they had surpassed the foundation in a lot of ways. We had to go back and look at ourselves and the way we were doing things.” With hard work and board training, the foundation developed a strategic vision to make their commitment to intentional diversity a working reality.

“If I can shed some light on where the funds need to be invested and the benefits different groups will receive, I’m happy to do so. Often board composition is such that trustees don’t understand the needs—most were born into privilege.”
—Juanita Bocanegra
Other focus group participants related concerns about being perceived as not having enough to bring to the table in a sector where board members are often selected as much for their wealth and influence as for their knowledge and leadership skills. When first elected to the board of the Capital Region Community Foundation, Bo Garcia recalled thinking “maybe I’m just not a ‘big dog.’” It was only after participating for some time that he began to hear his own voice and recognize its value. “We do have a lot to offer from our particular backgrounds,” he said. “If that’s not what they’re looking for, that’s okay. We still have a voice on the board. It’s an evolution in some ways.”

Paul Doyle spoke of the challenge he faced as chair of the board of the Grand Rapids Community Foundation during a capital campaign. “In networking and building support,” he remembers, “there was a message that the foundation couldn’t accomplish its [fundraising] goal without white leadership.” Doyle found himself relishing the challenge—and the reaction when his committee exceeded its goal. “It goes against what people want to see or think can happen,” he said. “We all know when we’ve hit that pulse and hidden values are challenged.”

Participants often found themselves coming up against the “numbers issue” in relationship to diversity. When Joseph Stewart, trustee for the W.K. Kellogg Foundation, noted that “you can’t change attitudes by counting numbers,” John Morning replied that “one of the ways attitudes are changed is through exchanges,” and those exchanges don’t happen in all-white boardrooms. “If there are no numbers,” he said, “there is no equity.”

In the end, there seemed to be some consensus around a need to move beyond both numbers and words like “diversity.” As Miles Wilson put it; “Is ‘diversity’ the wrong way to think about this? Should the conversation start with ‘equity?’”

Dorothy Maxwell, a trustee with the Capital Region Community Foundation, summed it up this way: “If you are on a board as a minority representative, many times you are selected because of that. Organizations want to look diverse. Beyond that is the problem of really hearing the voices of diverse trustees.”

DEFINING THE TERMS

For organizations, diversity can be understood in both internal and external terms. On the internal side, diversity is typically defined as the extent to which an organization has people from diverse backgrounds and communities working as board members, staff, volunteers, consultants, and vendors. But some take it a step further and see diversity work as extending beyond an organization’s walls to include the communities it serves.

In planning TMP, the Council of Michigan Foundations took this broader, external view. Diversity was defined as follows: Diverse individuals are from different genders, national origins, ethnicities, races, cultures, generations, religions, economic backgrounds, gender identities and sexual orientations, and possess different skills, abilities, lifestyles and beliefs. In this way, diversity was seen as encompassing the full breadth of societal differences included in the “diversity wheel.”

“What is philanthropy? The uplifting of humankind. If we’re not going to force risk-taking to achieve equity, we’re not doing the pioneering work we should be doing.”

—Joseph Stewart
"The ‘right people’ might be in the room, but the norms and practices needed to draw them into meaningful, inclusive dialogue can be missing.” —William Ryan

Julia Guevara has served on a number of foundation boards and nonprofit task forces, recruited for her “specific skill set” and because she is “well connected in the community at the grassroots level.” Her experiences as a Latina on boards made up primarily of “white males and females whose voices seemed to be more valued” have led her to understand that representation is one thing, but real participation is another.

“Organizations like to say they have a diverse board,” she said, but “behind the scenes is a ‘good old boy network,’ and when it hits, it hits hard. With one board member, you can have a dialogue, but, when you hit up against a network, communication is so much more difficult. It can be really discouraging to find the public face is not the same as the behind-the-scenes reality.”

Several focus group participants related experiences of coming up against invisible networks, having to work harder than their white colleagues to be heard, or simply feeling as if they didn’t “fit in” with the prevailing culture. Most agreed that achieving true equity was not just a matter of changing board composition, but also of realigning values and mores and ways of working to be more reflective of that new composition.

“I’d be hard-pressed to think of any foundation vision that doesn’t have something about diversity and inclusion. Do you live it, that is the question.” —Julia Guevara

Bobby Mukkamala, M.D., who has served on the Board of Trustees of the Community Foundation of Greater Flint for over five years, emphasized the need for “a lot of training to prepare people to be successful and effective trustees.”

“The first people of color to join a board that has only recently begun an effort to diversify will naturally feel that they are being brought in to represent the interests of a certain demographic,” Mukkamala said. He has seen a tendency for the new board members to focus comments and attention on matters that pertain to their demographic. “Instead, I would advise that while this is certainly a valued perspective of theirs, they are a board member first and a person of color second and their wisdom is equally important in both respects.”

Dorothy Maxwell agreed. “The expectation for the diverse individual is to represent ‘your’ community and the larger community,” she explained. Diverse trustees have the difficult task of “working towards an ‘assimilation of values’ without losing track of the minority view that can be difficult to articulate in ways that others can understand. But it’s still your responsibility to keep the channels open and keep the needs on the table.” Maxwell noted that in the philanthropic sector “minority communities haven’t had the resources to learn those processes.”
In addition to ongoing educational efforts like training sessions, speakers, and workshops that offer new perspectives and promote dialogue, trustees discussed the importance of having people in formal leadership positions take responsibility for articulating and modeling a commitment to diversity and inclusion.

Juanita Bocanegra said that part of her role as a diverse board member is “helping to educate as many as I can about the various struggles minorities encounter—not because they are minorities, but because of different economic struggles” which impact the likelihood of their being tapped or available to serve on boards—“not having the inclination or maybe the time.”

Many participants focused on the importance of formal policies and practices to provide accountability and transparency. As Kira Carter-Robertson put it, “In policy and procedure, you formalize commitment. Create those policies and graft them into the foundation functions.”

“Our job is to make sure the conversation about equity and minority need is addressed. If we don’t speak up, we’re not doing our job.”

—Hendrick Jones

One component of TMP research was a Review of Michigan Foundations’ Organizational Policies for Diversity and Inclusive Practice4 prepared by the Community Research Institute (CRI) on behalf of CMF. This analysis of the policies of 11 Michigan foundations, as evidenced by documents that included organizational bylaws and grantmaking guidelines, found that while most of these foundations had explicitly stated policies defining their visions of diversity and inclusion, few had policies “describing the ways in which communications and decision-making include the voices of various stakeholders.” In addition, “very few foundations have policies related to planning, monitoring, and evaluating the implementation of their commitments to diversity and inclusion.”

Human resource policies regarding recruitment and outreach may need to be reconsidered and refined by boards that want to create a culture of inclusiveness.

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http://www.michiganfoundations.org/s_cmf/bin.asp?CID=11362&DID=25968&DOC=FILE.PDF
DEFINING THE TERMS

As CMF’s work progressed, the understanding of diversity evolved to emphasize inclusion. CMF defined inclusion as: Inclusive philanthropic organizations seek out and consider the perspectives of diverse individuals to overcome current and historic systemic barriers and exclusion thus ensuring that all individuals have equitable opportunity to participate in society and philanthropy.

By the end of the second year of TMP, as board and staff worked on an overarching vision for the initiative, a third shift occurred in the scope of work to incorporate social equity.... Building the bridge for philanthropy requires not only managing the diversity of stakeholders (the “who”) and their inclusion in the process (the “how”), but also adopting a social-equity lens. To consider social equity as an aspect of bridge-building is to reflect and act upon the goal of creating a state (the “what”) where people experience equality of opportunity and are not denied access to resources as a result of their backgrounds, personal attributes, and group characteristics.


“You need to be prepared to respond to those who might say, ‘Where do we find these diverse leaders who can serve?’”

—Miles Wilson
“Typically, recruiting is considered a three-to-four-month ‘project,’” said Bushshan Kulkarni, trustee with the Ann Arbor Community Foundation. “Something we fail to do is realize that identification and recruitment of new trustees is a year-round task for all trustees: finding people of color who also have the necessary skills.”

Kulkarni’s foundation is experimenting with building a “cultural ambassador program” and creating an “entrepreneurs group which includes lots of diverse individuals” as channels for identifying future trustees. “We need to figure out how to maximize the value of these new channels into diversity,” he said, to create a “recruitment pipeline for leadership.”

Miles Wilson agreed on the “need to expand the pipeline.” From a strategic as well as a practical standpoint, he said, “we need to figure out a way of making sure that not being able to find people is not an excuse.”

Several participants raised the importance of recruiting for socio-economic and generational diversity. Juanita Bocanegra would like to see board representatives from “mid- and lower economic levels—to get everyone in one room to share ideas, both those who can contribute and those who can benefit.” More important than having “two of these and two of those,” she says, is having “socio-economic differences represented and for every voice to count.”

Diana Algra wants foundations to “be more strategic about how we engage younger people and more diverse ages on the boards.” She said, “You don’t get to understand what’s going on in your community without young voices.” Algra, now in her 60s, reflected on her own early experiences serving on boards. “When I came into those situations, I sat back and learned the dynamic before I spoke.” Her observation is that people in their teens, 20s, and 30s today “assume that their voices will always be heard.”

Asaline Scott, a member of the board of trustees of the Community Foundation for Muskegon County, agrees. “The younger people will come right in and ask the challenging questions.” She believes that foundation boards can benefit from that kind of openness, and would like to see much more inclusion of younger people on boards.

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**CONSIDER ASKING**

Formal policies and procedures signal an institutional commitment to inclusion, but informal norms governing individual behavior are important as well. To complement those, ask:

**What are our norms?**

Identify the individual behaviors and attitudes that board members are expected to adopt in order for the group to achieve inclusive dialogue. Chairs should explicitly encourage them in facilitating meetings. Boards that offer individual members regular feedback should provide encouragement or some guidance on how they can contribute to more inclusive dialogue. If such conversations feel too delicate, ask each board member to identify the steps she or he will take to contribute to inclusiveness.

See page 23 for the Discussion Guide.
THE GENERATIONAL LENS

According to the 2009 Michigan Organized Philanthropy Demographic Survey Results, Michigan-based foundations reported that their board trustees were between the ages of 35-92, with an average age of 62. CEOs ranged from 32 to 92 years of age, with an average age of 56.

Michigan law provides for youth 16 years of age or older to serve as full voting members of nonprofit and foundation boards. Several Michigan foundations have acted on that opportunity by appointing young people to their boards. The pipeline for most is service on Youth Advisory Committees (YACs) to community foundations.

Tessa Robertson was 16 when she had her first philanthropic boardroom experience as a member of the Ann Arbor Community Foundation’s Youth Advisory Committee. As a junior in high school, she was elected to the Foundation Board and soon after to the board of the Council of Michigan Foundations. Roberts believes that board participation has expanded her worldview and her ability to look at the big picture. “I definitely look at Michigan in a new light. It opened my eyes as to what it really takes to do this work,” she said. “When you get a chance to work on a board like this it says that the adults trust you with decision-making.”

Shelby Avery, 18, a trustee of the Saginaw Community Foundation agrees. “We may not be as eloquent as the adults on the board, but we definitely have something to offer.”
PART III: DIVERSITY + INCLUSION + INQUIRY

“THE STRUGGLE TO MAKE SHARED SENSE OF A SITUATION IS EXACTLY WHERE A DIVERSE AND INCLUSIVE BOARD DELIVERS THE MOST VALUE: MULTIPLE PERSPECTIVES, DIFFERENT VOICES, GENERATING AND STRUGGLING WITH HARD QUESTIONS WILL ENRICH A BOARD’S THINKING.” —WILLIAM RYAN

Asaline Scott told the story of another minority trustee who raised a racially charged incident in the community by sharing a newspaper article at a board meeting and asking, “What can we do to help?” Scott said she was “amazed at the different viewpoints that came up. Honestly, people were uncomfortable. Most of the trustees didn’t want to have the dialogue. But they did, and it was very useful in helping some of them understand what made them uncomfortable.”

“My philosophy about difficult conversations: the more uncomfortable, the more important the issue.” —Julia Guevara

Many focus group participants had similar experiences with “awkward” and uncomfortable conversations—or conversations that never took place for fear of offending diverse board members. John Morning, a trustee with the Charles Stewart Mott Foundation, noted that having “a trustee of color in the room may inhibit some detrimental discussions. In a preventive way, it can be positive to have diverse individuals on the board.”

Bo Garcia agreed that this kind of sensitivity “does bring awareness to the discussion.” But he worried that “when there’s a conversation that needs to be had, there may be a temptation to temper it for fear of offending a trustee.” For this reason, he believes it is “more incumbent upon diverse trustees to surface sensitive issues and ask, ‘What about this?’ ‘What about that?’ Because white trustees might not raise those questions.”

“If we don’t open the door enough to have an open dialogue from every perspective, we’re not doing our job.” —Paul Doyle
“When I came on the Grand Rapids Community Foundation board, it was mostly made up of bankers and lawyers,” said Paul Doyle. “It was a sea change for the board to add a black man who was not from those two worlds.” Doyle, who also consults on cultural competency, advocates what he calls an “appreciative inquiry approach” that allows people to say things that might be considered “politically incorrect” and to challenge each other in constructive ways.

Several trustees suggested that boards use these frank interchanges to review the goals of their foundation and its ability to understand and support needs of the community. One foundation's bar for success may be dramatically different from another's, based on the unique issues that face the community it serves. Bobby Mukkamala recommends beginning with “an internal assessment” that compares board composition to “the demographics of the community—that's where national statistics are not as good as local statistics.”

In defining goals for success, several trustees referred to the findings of the Greenlining Institute on how the country’s largest foundations allocate funding across sectors. The report showed that the top 50 independent foundations and the top 25 community foundations contributed only 3 percent of their total grant dollars to minority-led non-profit organizations. “We can do better,” a participant said. “Success to me is when those numbers improve dramatically and consistently.”

“The first question is, what are we trying to accomplish,” said Dorothy Maxwell. “What is the obvious change you want to achieve? Sometimes it’s increasing the number of diverse reps on the board, sometimes it’s more dollars to minority communities, sometimes it’s both.” Once goals are clearly identified, she noted, it’s essential to develop strategic plans to achieve those goals. “For many of us, that may be a new challenge—getting others on the board to understand this is a strategic need.”

Paul Doyle also stressed the importance of “a strategic framework and actual indicators of structural changes that organizations can be measured by to show they are on track.” He speculated that more accountability is necessary to take diversity and inclusion to the next level in philanthropy. “Let’s create some standards, structural guidelines, indicators that prove that foundation diversity is an asset to performance.”

“What we have to appreciate is that modern organizations do only what they can measure and what they set out as a real outcome.”
—Dorothy Maxwell
Other trustees cautioned against attaching too much significance to measurable standards and “numbers.” As Joe Stewart, trustee of the W.K. Kellogg Foundation, put it: “You can’t change attitudes by counting numbers. The fact that CMF and BoardSource have put out the real demographics on philanthropy and how badly we’re doing in terms of equity is taking the first step. But until we deal with the fact that lack of equity has to do with distribution of resources and who does and doesn’t have access, nothing changes.”

“We are not talking about getting attitudinal changes from ‘bad’ people. It’s about getting someone to see life through your lens and understand and appreciate the difference. We need to find common ground. Otherwise we’re just talking to each other.” —Joseph Stewart

**COURAGEOUS CONVERSATIONS**

In 1996, Grand Rapids resident and business owner Fred Keller attended a session at the Institute for Healing Racism hosted by the Grand Rapids Chamber of Commerce that he called “a game changer” for his role as a trustee of the W.K. Kellogg Foundation (WKKF). Seeing in diversity and inclusion the opportunity for “true give and take” in board-level conversations, he determined to learn and do more to promote racial equity.

During the same period, the Kellogg Foundation was on its own journey and by 2007 its board of directors committed the foundation to being an effective anti-racist organization working to achieve racial equity.

By 2010, the Kellogg Foundation board, CEO and staff launched the groundbreaking America Healing work, a five-year, $75 million effort to “intentionally address policies and practices that impede the goal of an equitable and promising future for all children.” It represented a crucial move for the entire foundation, and another step in an important journey for Keller, who was serving in his rotation as board chair during that time.

Funding research and programs that inform what WKKF President and CEO Sterling Speirn calls “courageous conversations about race and racism,” America Healing has also made efforts to engage the philanthropic community in a dialog on racial equity and grantmaking.

Speirn said America Healing reflects the transformational possibilities of clear policies and honest exchanges: “It is important to be intentional in addressing diversity and inclusion and not leave it to chance.”
PART IV: DIVERSITY + INCLUSION + INQUIRY = EQUITY

For the diverse trustees who participated in the TMP focus group, equity is the ultimate goal of increasing foundation board diversity and building an inclusive boardroom culture that struggles to create common ground. As Joseph Stewart put it, “the next step after diversity has to be equity.”

“In boardrooms we need to move the agenda to equity and changing communities. That’s the role of philanthropy.” —Joseph Stewart

Several trustees said closing the gap that John Morning referred to as a “disconnect between the fields you serve and board representation” is essential to achieving true equity on foundation boards. Kira Carter-Robinson called for community representation “from all levels: LGBTQ, gender, race, disability, etc.,” and noted that different socio-economic groups must be represented as well. “Not everyone on the board should be an executive,” she argued.

“Any community member should be able to identify with at least one person on the board so they feel, ‘Yes, my perspective is represented and my community’s needs are present on the board.’”
—Bobby Mukkamala
Failure to address issues of equity in foundation governance will eventually lead to irrelevance, participants cautioned. “At this point, if you are not about diversity and inclusion as an organization, you won’t succeed,” said Paul Doyle. “Whether you want to believe that or not, it’s the case.”

The trustees applauded the TMP initiative for identifying the “opportunity gaps” that prevent equitable access to full participation in society and philanthropy. They encouraged organizations like CMF to continue their efforts to communicate the importance of social equity in the philanthropic sector and to develop and share “best practices” through research and education.

“Looking at Michigan, it’s important for CMF to continue the work it’s started. As new CEOs enter the field of foundation leadership, we need to keep this conversation going.”

—Diana Algra
REAL APPROACHES TO CREATING DIVERSITY AND INCLUSION

How do you get beyond the rhetoric when it comes to building a diverse and inclusive foundation? For many of the foundation leaders interviewed, it’s a matter of articulating values explicitly and creating structures, policies, and consistent practices that put diversity and inclusivity at the core of foundation operations.

• Shout and model a commitment to diversity and inclusion from the top.
• Clearly and intentionally define what you mean by diversity.
• Build the values of diversity and inclusion into formal policies.
• Test practices and structures that can nurture and incubate diversity and inclusion.
• Bring on the right people – develop boards and staff with a diversity lens.
• Shore up organizational culture to support diversity.
• Establish measurable goals, collect data, and model transparency.
• Find creative ways to get the perspectives you need.
• Create grantmaking programs that directly address diversity and inclusion issues.

—from “Building Diverse and Inclusive Foundations: Lessons from Michigan”5
Focus Group Participants

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<tr>
<th>Name</th>
<th>Title</th>
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<tr>
<td><strong>MS. DIANA R. ALGRA</strong></td>
<td>Trustee</td>
<td>Capital Region Community Foundation</td>
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<td><strong>MS. JUANITA BOCANEGRA</strong></td>
<td>Trustee</td>
<td>Community Foundation of Holland/Zeeland Area</td>
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<td><strong>MS. KIRA CARTER-ROBERTSON</strong></td>
<td>Trustee</td>
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<td><strong>MR. PAUL DOYLE</strong></td>
<td>Trustee</td>
<td>Grand Rapids Community Foundation</td>
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<td>Trustee</td>
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<td><strong>DR. JULIA A. GUEVARA</strong></td>
<td>Trustee</td>
<td>Grand Valley State University</td>
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<td>Fremont Area Community Foundation</td>
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<td>Ann Arbor Area Community Foundation</td>
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<td><strong>MS. DOROTHY E. MAXWELL</strong></td>
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<td><strong>MR. JOHN MORNING</strong></td>
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<td>Charles Stewart Mott Foundation</td>
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<td><strong>DR. BOBBY MUKKAMALA</strong></td>
<td>Trustee</td>
<td>Community Foundation of Greater Flint</td>
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<td><strong>MS. ASALINE SCOTT</strong></td>
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<td><strong>MR. JOSEPH STEWART</strong></td>
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<td><strong>OTHER TRUSTEES INTERVIEWED</strong></td>
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<td><strong>MR. FRED KELLER</strong></td>
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<td>Chair</td>
<td>Ruth Mott Family Foundation</td>
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<td><strong>MS. TESSSA ROBERTSON</strong></td>
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DIVERSITY + INCLUSION + INQUIRY = EQUITY: A DISCUSSION GUIDE
by William P. Ryan

Building a diverse and inclusive board is a journey. Boards encounter different challenges as they move from taking their first steps toward becoming more diverse; to finding themselves stuck (as many do) in that effort; and, once they have a diverse membership, tackling the challenges of encouraging inclusiveness. The discussion questions below are aimed at helping boards refine their sense of their challenges—and their strategies for meeting them—at each of these stages.

I. WE’RE JUST STARTING

For most organizations, building a diverse and inclusive board is a major undertaking. But they often start with little more than a broad directive to a nominating committee, which is charged with finding a new type of board member. If organizations recognize building a diverse and inclusive board for what it is—a major change initiative—they will have to dig deeper.

Question 1: What are the costs of our status quo?

When considering change, we tend to associate the costs with the new way of doing things. But it’s more important to study the costs of not doing the new thing. If a board identifies specific, significant costs of the status quo, it is more likely to be motivated in seeking change. Costs can take many forms, affecting both an organization’s performance and integrity. Specifics might include failure to live up to espoused values, impoverished thinking, weakened networks, diminished reputation, competitive disadvantage, etc.

Question 2: What is our strategy?

Charging the nominating committee to find new members is not a strategy for building a diverse board, any more than charging a development department to find new money is a fundraising strategy. What will it take to get us from A to B? What is the best path?

Question 3: Why won’t our plan work?

Cognitive psychologists have found that one of the best ways to succeed in implementing a plan is to identify the things that will go wrong. It’s usually surprisingly easy for groups to predict how they are likely to fail. And with those specific obstacles in mind, it’s possible to build a more robust plan.

Question 4: How will we hold ourselves accountable?

Precise plans, timetables, and assignments—the types of supports we naturally use when tackling goals we care about—should be developed for a diversity initiative.
II. WE'RE STUCK

Many boards have longstanding commitments to diversity and inclusion but little to show for it. For them, restating their commitment isn’t enough. To make progress, they have to get into problem-solving mode, using the same mindset and inquiry they would to tackle any major strategic challenge facing the organization.

**Question 1: Who's gotten the job done?**

Seek out one or two organizations that have succeeded in building a more diverse and inclusive board for candid discussion and learn from them. If you can identify at least one organization that had to struggle to succeed, the learning is likely to be even more powerful. What obstacles did they face? What got them moving, or unstuck? What did they have to change—in their thinking, attitudes, or practices?

**Question 2: What don't we see about ourselves?**

If your board is stuck because attractive candidates are turning you down, it’s time to figure out how you look to others. People striking out at online dating often go to friends (especially the type of friends they want to appeal to) for some candid, maybe brutally honest, advice about their profiles. If it’s possible to enlist help from the type of candidate you want (probably one who has not turned you down), find out what would make your organization more attractive. The thing you need to know is probably the thing you are not seeing.

**Question 3: Who don't we know?**

In becoming more diverse, it’s not who you know that matters, but who you don’t. Those are often the people you want. Turning for help to contacts who look exactly like you often yields little: everyone is in the same network. The key is to get to people who are probably at the edge of our networks but at the center of the ones we want to connect with.

**Question 4: What would we do if we weren't afraid?**

Often being stuck is not about ignorance but about fear. If we simply ask what steps we would take if we weren’t afraid, they often snap into focus, and so do the fears holding us back.
III. WE’RE MORE DIVERSE!

Often boards spend all of their effort trying to get the right people to the table, and have given little thought to what they are to do once they get there. Now it’s time to ask: how do we make our diverse board more inclusive?

**Question 1: When have we succeeded?**

Most boards can point to at least one experience where everyone agrees that robust, searching dialogue has improved the board’s thinking and judgment. Usually, it’s the retreat (if it was well designed and run). Identify what conditions at the retreat enabled that dialogue. It doesn’t require an overnight in the country with a professional facilitator to create similar conditions in the boardroom. Identify two or three features—of the agenda, facilitation techniques, even configuration of seating—that seemed to help. Then import them into regular board meetings.

**Question 2: What are our norms?**

Identify the individual behaviors and attitudes that board members are expected to adopt in order for the group to achieve inclusive dialogue. Chairs should explicitly encourage them in facilitating meetings. Boards that offer individual members regular feedback should provide encouragement or some guidance on how they can contribute to more inclusive dialogue. If such conversations feel too delicate, ask each board member to identify the steps she or he will take to contribute to inclusiveness.

**Question 3: How will we measure success?**

Develop a simple process for tracking the extent to which board meetings are supporting more inclusive dialogue. Boards can easily create a rapid-assessment form—to be filled out at the end of the board meeting, when impressions are fresh and board members are captive—that shows how board members feel they are doing. At intervals, present the data from several meetings to the board, and make sense of it. What’s getting in the way? What do we need to improve?

**Question 4: Who needs our help?**

If you’ve met all your goals, be sure to help your counterparts at organizations that are just setting out or that find themselves stuck.