

Operations

Foreground equity in internal operations such as HR & talent management, community engagement, financial management, procurement, and marketing & communications.

Introduction

Several components are important to keep in mind in order to center equity priorities and strategies within an organization:

- HR & talent management
- Community engagement
- Financial management
- Marketing & communications

Tools for equity

HR & talent management

Grantmaking organizations shape their staff and also determine the composition of the board of trustees or directors, as well as volunteer staff and advisory bodies. These groups should be as diverse as possible, particularly at decision-making levels, to embody and advance an equitable strategy and mission.

Many of the changes that an organization may seek to implement with regard to people or staffing have legal implications. Should you plan to engage in substantive shifts in your policies, approaches or practices, consult with a lawyer. If you are collecting, holding or disseminating data about people (demographic, workplace, etc), you may also want to consider legal consequences. The law is constantly in flux at the state and federal level. There are many possible considerations so it is best to engage with someone who is skilled in HR and employment law to make sure you are in compliance.

Funders as employers

- A direct way to put into practice the philosophy of inclusion is to hire employees who have diverse backgrounds.
- For funders, diversity is often described with a focus on race and ethnicity. A wholistically inclusive workplace is one where people with varying differences including, for example, differing abilities, sex, gender identity and sexual orientations, religion, class backgrounds, education, philosophies, and ages will also feel that their voices are heard and respected.
- A diverse staff and board, which reflect the communities they serve, do better grantmaking because they bring myriad experiences and perspectives to the table.
- Broadening the hiring pool, rethinking hiring requirements (e.g. not requiring past philanthropy experience, or not setting education requirements beyond what is required to best perform in a position) and supporting diverse candidates once they are hired can help advance board and staff diversity

Key questions

- Does your organization have clear strategies for increasing the diversity within your grantmaking organization?
- How could the values of your organization be better achieved through inclusive employment and board-selection practices?
- Are there barriers in the hiring process that screen out otherwise capable candidates?
- What value do you place on a candidate's knowledge of, and experience in, the community served by your organization?
- Are the perspectives of the community served reflected in the organization's decision-making?

Action steps

- Define and record your organization's values. Discuss how those values are reflected in inclusive-hiring practices. Define underlying organizational rationale, and develop the culture to make this a priority and key goal
- Develop policies to institutionalize inclusive practices, such as in hiring, consultant-use, and board composition
 - For reference, see this [fact sheet on Equity, Diversity and Inclusion in Recruitment, Hiring and Retention](#) from the Urban Sustainability Directors Network
- Set goals and periodic measurements, provide for accountability, and vertically integrate goals with leaders and management (such as making them part of reviews)
- Examine questions of personal and organizational bias (such as blind spot bias, confirmation bias, perception bias, and affinity bias), and utilize bias interrupters in practices
- Provide and encourage staff development and career ladders for all employees, and support development of cultural-specific affinity groups or networks
- Conduct an annual census or survey of volunteers, employees, and trustees to document employment diversity with the goal of improving diversity and furthering your impact beyond grantmaking and programs
- Be aware that many organizations that add diverse employees may fail to adequately provide a sense of belonging (during onboarding, via training, and throughout organizational culture)
 - Provide cultural agility, diversity and management training
 - Rethink your onboarding, learning and culture-building processes and consider what inclusion looks like from the perspective of new diverse employees

Sources

D5 Coalition

Building on a Better Foundation: A Toolkit for
Creating an Inclusive Grantmaking Organization

Equity-informed Decisions Tool

This tool (originally developed by [Mosaic for Equity](#)) helps leaders understand the consequences of decisions, and who makes them, in their workplace. The tool helps build curiosity about how choices may impact individuals and demographic groups in your workplace. Remember to consider all types of diversity among the people and groups that the organization seeks to represent in the workplace as well. This tool can support choices that are in alignment with your values and commitments.

As you ask the questions below, insert various aspects of diversity at **X**, such as:

- Age
- Ability, both physical and mental, both visible and not
- Education
- Ethnicity/national origin
- Family/pregnancy/caregiver status
- Geographic location
- Gender identity or expression
- Language
- Neurodiversity
- Race/color
- Religion, belief and spirituality
- Sexual orientation
- Veteran status

Be mindful that many people belong to various and intersecting communities.

1	Represented	To what extent are X voices and perspectives represented in the decision-making process?
2	Consulted	To what extent have X voices and perspectives been consulted in the decision-making process?
3	Equipped	To what extent are X group members equipped for success? What barriers might prevent X members from success as a result of decisions that are made?

Engage in conversations to understand how well people have been represented, consulted and equipped. Should you discover disparities, find ways to address them, within legally appropriate pathways. Engage conversations with your employees and managers, as this is one way to exercise a shared decision-making model.

Sources

Mosaic Consulting

Mosaic for Equity

Community engagement

Apart from grantmaking, funders can play a key role in communities by listening to the needs and issues of diverse constituencies. They can offer technical assistance and become equal participants in their communities, gaining valuable insight and knowledge through firsthand experience, and can often act as facilitators and initiators of community action.

By becoming active participants in their communities, grantmaking organizations will also strengthen their ability to recognize and support diversity because they are in and of the community, not just operating at arm's length.

Key questions

- How well do you know the different facets of your community and its leaders and how well do they know your mission and program staff?
- How can your staff and trustees develop and maintain a range of contacts to inform you about the communities in which you are making grants?
- Based on the priorities of your organization's mission and values, are there activities besides grantmaking that could inform you about a community and its needs and assets?
- How can your organization play the role of convener and broker of community relationships and resources?

Action steps

- Disseminate information about your organization and its grantmaking goals broadly within the communities you serve. Advertise guidelines or requests for proposals in newsletters and magazines that reach community groups
- Consider participating in community coalitions or alliances. Partner with other organizations on initiatives that support diversity in the community
- Listen to community concerns and learn about their assets outside of the grantmaking process. Attend community events not directly related to your grantmaking
- Consider offering a different kind of resource needed by the community, such as a meeting space or a workshop
- Invite community leaders, such as elected officials, religious leaders, school principals, hospital administrators, and nonprofit heads to address staff and board meetings

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Financial management

Grantmaking institutions can direct their financial activities in ways that amplify a commitment to inclusion and complement their grantmaking missions. By investing their endowments in socially responsible ventures, funders can demonstrate that financial and social returns are not mutually exclusive.

Through investments and purchasing decisions, funders can support businesses owned by women, people of color, and other traditionally bypassed groups. In doing so, they are participating in the development of a diverse workforce and healthy economy.

Example: The Minnesota Council on Foundations has instituted a [supplier diversity program](#) to secure goods and services from organizations that are at least 51% owned and operated by underrepresented groups (people of color, women, LGBT), with secondary preference given to organizations that are small (less than 20 employees), locally-based, and socially responsible (e.g., promote sustainable practices, living wage policies or actively provide jobs/training to women, people of color, and/or LGBT people).

Key questions

- Does your policy on inclusion and diversity extend to your investments and vendor relationships?
- In what ways could your organization's mission be enhanced if investment goals were more closely aligned with your grantmaking goals?
- How can your organization's assets be used to support the economic vitality of the communities your grants support?
- In what ways could your organization use its purchasing policies and investment strategies to accomplish its philanthropic mission?

Action steps

- Invest wisely
 - Initiate a discussion about the organization's investment portfolio among board members and develop a policy on socially responsible investment that matches your values and areas of interest. Seek out an investment manager experienced in socially responsible investing
- Choose vendors
 - Discuss with board members and staff the pros and cons of including diverse vendors or making investments that support businesses owned by diverse groups
 - Set goals of adding one or two vendors yearly from diverse communities served by your grantmaking. Contact chambers of

commerce representing diverse communities and use their member directories to identify potential vendors

- Be a community citizen
 - Network through your regional association of grantmakers with those who have used their economic resources, beyond grants, to support community efforts
 - Consider creating a revolving loan fund to support economic activity in your communities
 - Consider a policy to match employee gifts to nonprofits. If you already have such a policy, find out whether community-based nonprofits are eligible for matching gifts

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Marketing & communications

Equitable marketing and communications are crucial to achieving the goals of many programs, supporting knowledge sharing, and engaging with community members. Key elements of equitable communications include centering values and focusing on solutions to systemic obstacles using multicultural and inclusive approaches.

Key questions

- Are your communications reaching the communities you serve? How might they be more accessible?
- Is your organization aligned on the way it messages your mission, strategy & equity?
- Are the perspectives of the community served reflected in the organization's communications?
- Do your website and public materials reflect your organization's approach to equity?

- Do employees have a good understanding of the key messages, values and priorities when communicating internally and with other stakeholders?

Lead with shared values

- Starting with broadly shared values can help people “hear” your messages more effectively than dry facts or ideological rhetoric. Encouraging people to think about shared values encourages aspirational, hopeful thinking
 - Sample: “It’s the beating heart of our American idea—our bold experiment in self-government. It’s the conviction that we are all created equal, endowed by our Creator with certain unalienable rights, among them life, liberty, and the pursuit of happiness. If we’re going to be serious about race going forward, we need to uphold laws against discrimination—in hiring, and in housing, and in education, and in the criminal justice system. But laws alone won’t be enough. Hearts must change.” – [Barack Obama, Farewell Address](#)

Use values as a bridge

- Opening conversations with shared values helps to emphasize society’s role in affording a fair chance to everyone. But starting conversations here does not mean avoiding discussions of race
 - Sample: “A beautiful thing about this country is its multiracial character. But right now, we’ve got diversity with a lot of segregation and inequity. I want to see a truly inclusive society. I think we will always struggle as a country toward that—no post-racial society is possible or desirable—but every generation can make progress toward that goal.” – [Rinku Sen \(Race Forward\) on NBC News](#)

Be solution-oriented and forward-looking

- After laying the groundwork for how the problem has developed, it's key to move quickly to solutions. Some people who understand that unequal opportunity exists may also believe that nothing can be done about it, leading to "compassion fatigue" and inaction. Wherever possible, link a description of the problem to a clear, positive solution and action, and point out who is responsible for taking that action
 - **Sample:** Asian Americans often face particularly steep obstacles to needed health care because of language and cultural barriers, as well as limited insurance coverage. Our Legislature can knock down these barriers by putting policies in place that train health professionals, provide English language-learning programs, and organize community health centers

Motivate people to connect and collaborate

- Rather than viewing social problems through an individual lens, underscore how history, policies, culture, and many other factors beyond individual choices impact actions and opportunities. If the problems are systemic, so are the solutions
- Maintain narrative confidence to advance new or emerging stories and possibilities
- Instill and reinforce beliefs to help shift prevailing narratives and misrepresentations

Sources

The Opportunity Agenda

Ten Lessons for Talking About Race, Racism, and Racial Justice

Color of Change

Telling the Right Story on Race During COVID-19

Reach your audience

Consider audience and goals

- Who are you hoping to influence?
 - Narrow your target audience to refine your strategy
- What do you want them to do?

- Determine the appropriate action for your audience and strategy. Sometimes you may have direct access to decision-makers and are working to change their minds. Other times you may have access to other people who influence the decision-makers
- What do you know about their current thinking?
 - Glean information from public opinion research, social media scans, their own words, etc.
- What do you want to change?
 - Consider the change you would like to enact and concrete steps to advancing those shifts
- Whom do they listen to?
 - Identify the media your core audience consumes and the people who are likely to influence their thinking. This may be an opportunity to reach out to allies to serve as spokespeople if they might carry more weight with certain audiences.

Listen to and center the voices of impacted communities

- When discussing the harm caused to particular groups, make sure their voices are part of the conversation
- Take cues from community leaders on things like preferred language and strategy
- Reduce erasure and unpaid labor by giving credit and/or compensation to people who have sparked movements, coined terms, tested and spread language, and so on
- Be vigilant in ensuring that those who have power share their power, particularly those whose voices have been marginalized and those who experience multiple barriers

Prioritize multilingual, multi-channel messaging

- Make sure your message reaches your intended audience
- Strive to present your communications in the languages, formats and framings that are most accessible and impactful for all segments of your target audience

- Make sure your messaging is developed with multiple communication channels (radio, social media, print, community events, etc.) and with the right messengers that your audience will hear

Sources

Council on Foundations

Ten Ways for Community Foundations to Consider Diversity and Inclusive Practices

RESPECT / Annie E. Casey Foundation

Advancing the Mission: Tools for Equity, Diversity, and Inclusion

RaceForward

Racial Equity Impact Assessment Toolkit