



# DIVERSITY EQUITY INCLUSION

**A Snapshot of  
Promising Practices  
Among Indiana  
Foundations**

As a follow-up to our *Giving in Indiana* study (released earlier this year), IPA is pleased to share this snapshot of promising practices for advancing diversity, equity and inclusion in Indiana philanthropy. Throughout our state, foundations are incorporating the values of diversity, equity and inclusion (DEI) into their organizational cultures; engaging diverse populations as staff, board members, donors, and grantees; and working to make their communities more welcoming places. This report is an effort to capture a sampling of these endeavors. It is not intended to provide a complete picture or scientific analysis of DEI efforts among Indiana foundations.

We are grateful for the continued guidance of the Member Services Committee and the Diversity Subcommittee of the IPA Board of Directors. We also wish to express our deep appreciation to the D5 Coalition for its financial support.

## Process/Methodology

In the summer of 2014, the content of 138 IPA member websites was searched using the keywords: diverse, diversity, equity, inclusion, disability, LGBTQ, ethnic, ethnicity, race, equal opportunity, gender, equality, minority, minorities.

- Where mission statements, vision statements and/or strategic plans were present, these were searched using the same keywords.
- Where organizational and grantmaking policies, procedures or processes were present, these were searched using the same keywords.

IPA member foundations also received an email request for specific examples of diversity, equity and inclusion practices. Nine foundations responded to this request, and their examples are shared in this report.

In 2011, IPA conducted a demographic survey of its member foundations, at the request of its Member Services Committee. Forty-two foundations responded, and some of the survey results are included in this report.

## Definitions

Definitions for diversity, equity and inclusion vary. It is not uncommon for funders to consider the demographics of their local communities as they define diversity for themselves. For the purposes of this report, we are using the same definitions of diversity, equity and inclusion used by the D5 Coalition (a national network working to grow philanthropy's diversity, equity and inclusion). We are also using elements of the specific beneficiary populations analyzed by the Foundation Center in *Giving in Indiana*. These populations are defined in terms that include age, gender, racial/ethnic identity, economic disadvantage, sexual orientation, disabilities, rural populations, and other factors.

# DIVERSITY

## Diversity Defined

Diversity defined: The D5 Coalition defines diversity in a broad sense: Diversity encompasses the demographic mix of a specific collection of people, taking into account elements of human difference but focusing particularly on:

- Racial and ethnic groups: Asian Americans and Pacific Islanders, Hispanics/Latinos/Latinas, African Americans and Blacks and American Indians and Alaska Natives
- LGBT populations
- People with disabilities
- Women



# DIVERSITY

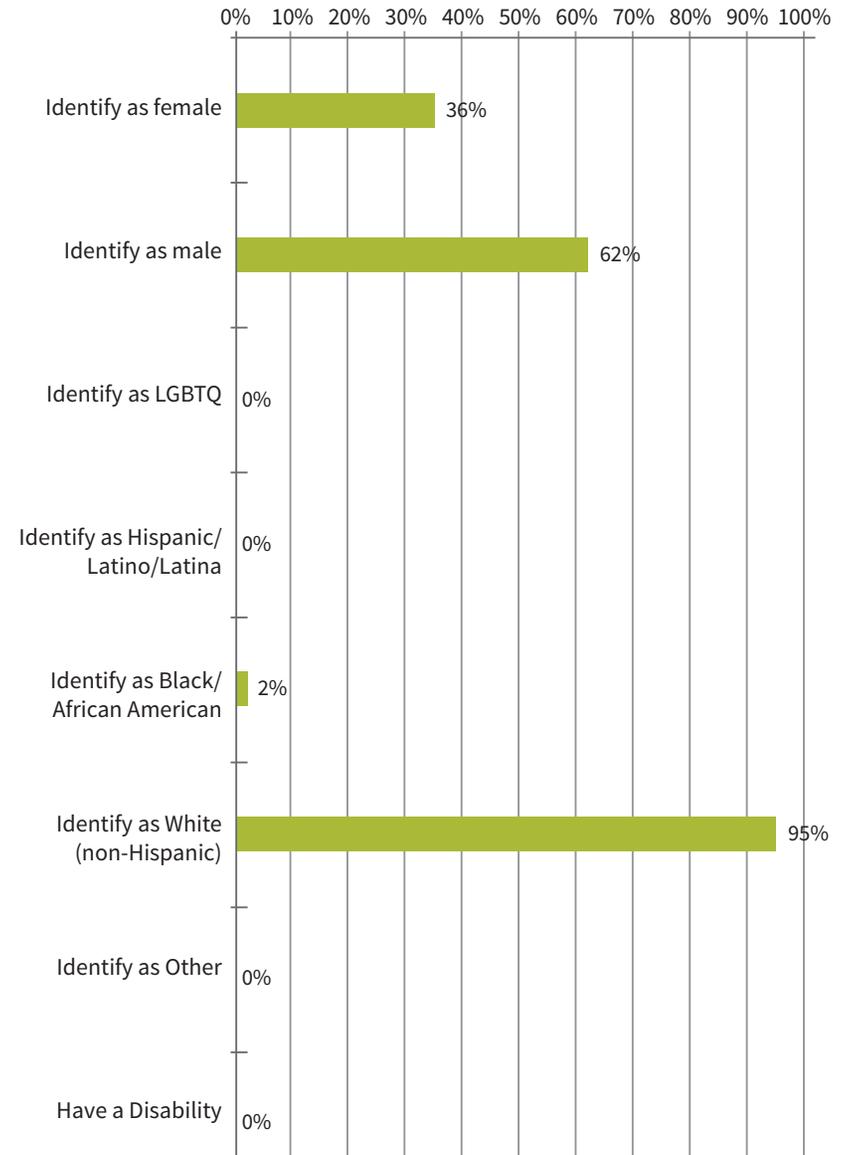
## What Do Indiana Foundations Look Like?

In 2011, IPA conducted a demographic survey of its member foundations, at the request of its Member Services Committee. Forty-two foundations responded. The findings below are based on the results of this survey.

### Boards of Directors

- 8 foundations reported having 1-2 board members who identified as black/African American (response count: 35)
- 5 foundations reported having 1 board member who had a disability (response count: 36)
- 4 foundations reported having 1-2 board members who identified as LGBTQ (response count: 32)
- 3 foundations reported having 1-4 board members who identified as Asian/Asian American (response count: 34)
- 2 foundations reported having 1 board member who identified as Hispanic/Latino/Latina (response count: 34)
- 1 foundation reported having 1 board member who identified as multi-racial (response count: 33)
- 100 percent of respondents reported having at least 2 board members who identified as white (non-Hispanic) (response count 41)
- 73 percent of respondents (30 foundations) reported having 11 or more board members who identified as white (non-Hispanic) (response count 41)
- No respondents reported having board members who identified as Arab/Arab American, Native Hawaiian/Pacific Islander, or Native American/Alaska Native

### Board Chair Identification



Numbers may not add to 100% because not all survey respondents answered the question.

# What Do Indiana Foundations Look Like?

## Staff

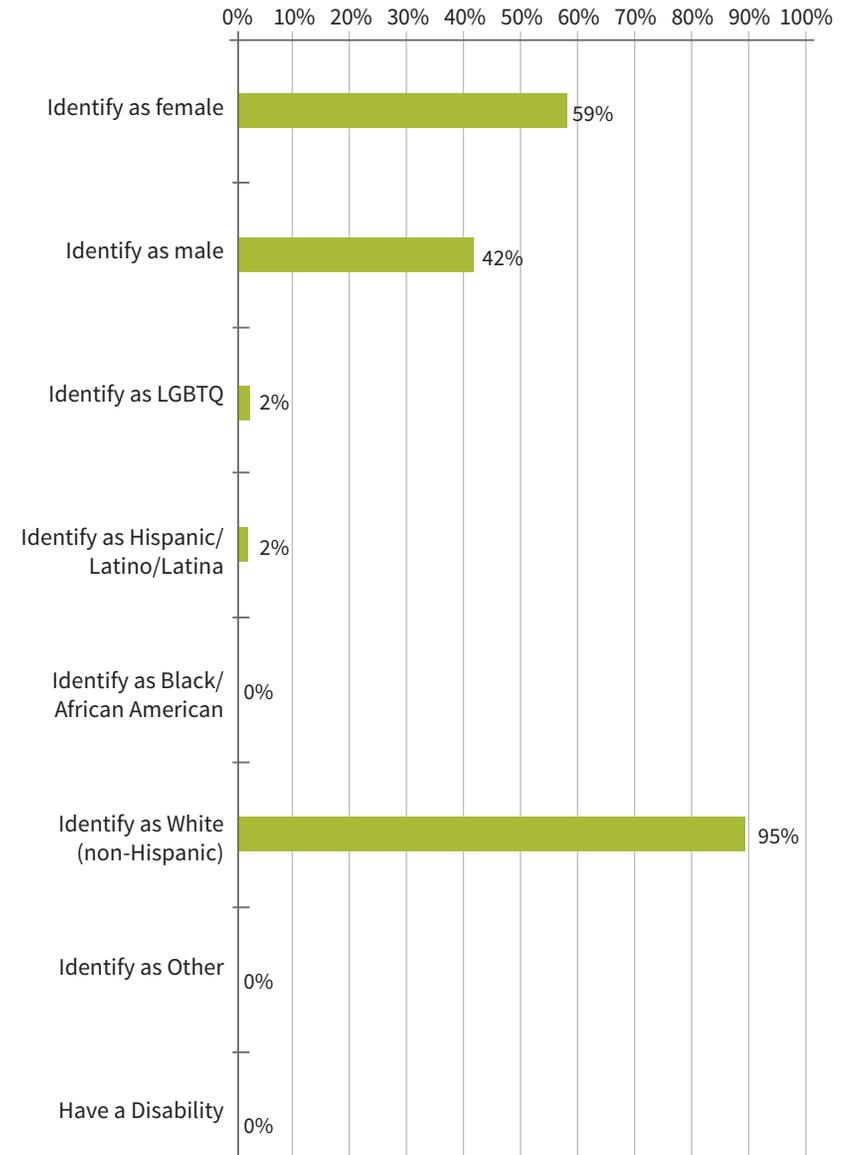
### VP and higher (excluding CEO)

- 1 foundation reported having 1 staff member, VP and higher (excluding CEO), who...
  - had a disability (response count: 32)
  - identified as black/African American (response count: 30)
  - identified as LGBTQ (response count: 27)
  - identified as Hispanic/Latino/Latina (response count: 30)
- 20 foundations reported having at least 1 staff member, VP and higher (excluding CEO), who identified as white (non-Hispanic)
- No respondents reported having staff members, VP and higher (excluding CEO), who identified as Asian/Asian-American, Arab/Arab American, Native Hawaiian/Pacific Islander, Native American/Alaska Native, or multi-racial

### Full-time, below VP level

- 3 foundations reported having 1 full-time staff member, below VP level, who identified as Hispanic/Latino/Latina (response count: 31)
- 2 foundations reported having 1-2 full-time staff members, below VP level, who identified as black/African American (response count: 32)
- 1 foundation reported having 1 full-time staff member, below VP level, who identified as LGBTQ (response count: 28)
- 30 foundations reported having at least 1 full-time staff member, below VP level, who identified as white (non-Hispanic)
- No respondents reported having full-time staff members, below VP level, who had a disability or who identified as Asian/Asian-American, Arab/Arab American, Native Hawaiian/Pacific Islander, Native American/Alaska Native, or multi-racial

## CEO/President/Executive Director Identification



Numbers may not add to 100% due to rounding.

# DIVERSITY

## 2014 Member Website Review

- 14 foundations included diversity, equity or inclusion in their mission, vision or values statements.
- 16 foundations mentioned a nondiscrimination policy.
- 10 foundations mentioned diversity in relation to board, staff, volunteers or donors.

## Observations

- Indiana foundations that seek to achieve racial/ethnic diversity in their workforce, boards of directors and volunteer bases are often challenged by the limited demographic diversity of their communities.
- Information about the demographic makeup of foundation boards, staff or volunteers is typically not reported on their websites.
- Indiana foundations include age, economic status, geographic boundaries, and other factors in addition to race/ethnicity, gender and sexual orientation when considering diversity.



## What are Indiana Foundations doing?

### Lumina Foundation

In January of 2014, Lumina Foundation appointed its first Director of Equity and Inclusion, Susan Johnson. The position was created as a result of Lumina's strategic planning process. During that process it was determined that one of the priorities for the organization was to be more explicit about equity and to advance focused efforts around it both externally (grantmaking, communications, partnership engagement, etc.) and internally (operations, hiring, staff training, etc.). Already showing an increase in diverse staff between 2013 and 2014, Susan Johnson reflects, "We have been more intentional in making sure our pool of potential job candidates was representative of who we serve."

Because the Director of Equity and Inclusion position is new, Lumina's current focus is on racial equity though it recognizes that the discussion about diversity, equity and inclusion is broad and constantly evolving within the field. In her short time in this new role, Susan has led the development of Lumina's Equity Imperative that defines specific populations of focus as well as laid out next steps the organization will be taking both externally and internally to increase their equity efforts. Susan plans to use the remainder of 2014 to review and assist strategies with embedding and calling out equity as part of their upcoming work plans while also participating in partner conversations about equity and inclusion, conducting staff training and developing communication tools that speak to the importance of addressing racial inequities in higher education.

# What are Indiana Foundations doing?

## Central Indiana Community Foundation

In 2013, the Central Indiana Community Foundation received an award for Workforce Diversity at the Mayor's Celebration of Diversity Awards program in Indianapolis. This program recognizes businesses and organizations that embrace, celebrate and apply holistic inclusion and participation of diverse people; making the workplace a better environment in which to work and the community a better place in which to live, work and raise a family. In addition to its diverse grantmaking, CICF embraces diversity throughout the organization by insisting upon a culture that fosters inclusion, transparency and participation. The net result of this environment is a celebration of contributions from all staff, regardless of race, gender or creed.

Though CICF's staff is relatively small (45 people), it actively considers and recruits minority candidates for each of its open job positions. In 2012, at the time of the award, two of CICF's top five executives were women. And 19% of CICF's staff included minority representation. The foundation's long-term diversity improvement is led by minority membership on its board, and staffing needs and hiring practices are frequently discussed at board, executive and human resource levels to ensure efforts are made to improve diversity.

## Unity Foundation

Many foundations struggle to keep their boards, staff and volunteers diverse. At the Unity Foundation in 2012, a Member Talent Grid was developed as a tool for seeking grant review team members to make sure the team was inclusive of the demographics of the entire county. Key areas included on the Member Talent Grid are: geography, culture, race, gender and areas of expertise. As the foundation recruits new members to the grant review committee it plots individuals out on this grid and then reaches out to people who meet the diverse needs of the committee to ensure that gaps are filled. Recently, current members of this group who have been serving for several years, also filled out the grid in an effort to identify skills or other characteristics that the foundation may have not been aware of.



# What are Indiana Foundations doing?

## Old National Bank Foundation

In August of 2013, Old National Bank made both an internal and external public statement by adding diversity and inclusion as a core value and by developing and filling a new Diversity and Inclusion Director position. According to Danyelle Granger, Diversity and Inclusion Director, “Old National’s corporate values are the guiding principles that inform our way of doing business and shape our interactions with clients, communities and one another. Including Diversity and Inclusion as one of our corporate values aligns with our company’s vision and mission.” As the Diversity and Inclusion Director, Danyelle is responsible for developing and executing the corporate-wide diversity and inclusion strategy; leading the development, implementation, management, monitoring and evaluation of Old National’s corporate policies and programs as they relate to diversity and inclusion in the company’s workforce, workplace, marketplace and community. Old National continues to develop and implement strategies that specifically address diversity and inclusion throughout the company.

Like many corporate foundations, the Old National Bank Foundation is the philanthropic arm of Old National Bank and mirrors the company’s values, which include diversity and inclusion. The Foundation’s funding priorities include affordable housing, early childhood & youth development, economic development, financial literacy, and workforce development. Through its charitable giving programs, the Foundation demonstrates Old National’s commitment to improve the quality of life in the communities of Indiana, Kentucky, Southern Illinois and Central and Western Michigan, where its clients, associates and shareholders live and work. The Old National Bank Foundation supports organizations and initiatives that advance diversity and inclusion in communities where they have a corporate presence and have funded specific projects with a focus on disability, LGBT, veteran and low-to-moderate income populations. Board members reflect various aspects of diversity as well. According to Janet Baas, Foundation President, “the ONB Foundation is pleased and proud to partner with nonprofit organizations focused on strengthening our communities through initiatives with meaningful impact and measurable outcomes. Our core values are aligned with the company as we evaluate programs and initiatives.”



# EQUITY

## Equity Defined

Improving equity is defined as promoting justice, impartiality and fairness within the procedures, processes, and distribution of resources by institutions or systems.

### Giving in Indiana

The *Giving in Indiana* study released earlier this year includes an analysis of grants awarded by Indiana foundations that were intended to benefit specific population groups. The following table highlights the findings of this analysis.

#### Percent of Grants Intended to Benefit Specific Population Groups, 2011

	Funder Reported Grants <sup>a</sup> (n=512)		All Indiana Grants <sup>b</sup> (n=4,166)	
	No.	%	No.	%
<b>Age</b>				
Children/Youth	205	40.0	1,138	27.3
Aging/Elderly	18	3.5	102	2.4
Other Age Group	26	5.1	16	0.4
<b>Total Age-Specific</b>	<b>241</b>	<b>47.1</b>	<b>1,231</b>	<b>29.5</b>
<b>Race/Ethnicity</b>				
African Americans/Blacks	15	2.9	67	1.6
American Indians/Native Alaskans	0	0.0	11	0.3
Asians/Pacific Islanders	1	0.2	4	0.1
Hispanic/Latinos	12	2.3	27	0.6
Other Minorities	1	0.2	2	0.0
Minorities (General)	10	2.0	151	3.6
<b>Total Racial/Ethnic Minorities</b>	<b>32</b>	<b>6.3</b>	<b>256</b>	<b>6.1</b>
<b>Gender</b>				
Men/Boys	17	3.3	124	3.0
Women/Girls	35	6.8	259	6.2
<b>Total Gender-Specific</b>	<b>41</b>	<b>8.0</b>	<b>303</b>	<b>7.3</b>

	Funder Reported Grants <sup>a</sup> (n=512)		All Indiana Grants <sup>b</sup> (n=4,166)	
	No.	%	No.	%
<b>Other</b>				
Economically Disadvantaged	142	27.7	829	19.9
Immigrants/Refugees	8	1.6	24	0.6
LGBTQ	3	0.6	8	0.2
People with Disabilities	30	5.9	262	6.3
Rural Populations	9	1.8	0	0.0
Other	12	2.3	51	1.2
<b>Total Other Populations</b>	<b>176</b>	<b>34.4</b>	<b>1,090</b>	<b>26.2</b>
<b>Any Population Group</b>	<b>328</b>	<b>64.1</b>	<b>2,045</b>	<b>49.1</b>
<b>None</b>	<b>184</b>	<b>35.9</b>	<b>2,121</b>	<b>50.9</b>
<b>TOTALS</b>	<b>512</b>	<b>100</b>	<b>4,166</b>	<b>100</b>

Source: The Foundation Center, 2014. These analyses are based on the 512 sampled grants and estimates based on the grants description coding of the 4,166 grants in the set.

The margin of error for the sampled grants estimates is 4.1 (95% confidence interval).

<sup>a</sup> "Funder reported grants" figures represent information shared by Indiana grantmakers with data collectors during personal correspondence.

<sup>b</sup> "All Indiana grants" figures represent information accessible in Indiana grantmakers' IRS 990 forms.

# DIVERSITY EQUITY

## 2014 Member Website Review

- 5 foundation websites mentioned a specific policy or grant guideline stating that the foundation does not fund organizations that discriminate.
- 83 foundations websites indicated specific funds or grants intended to benefit a specific population related to race/ethnicity, gender, disability or sexual orientation.

## Observations

- Indiana foundations that report funds (not grants) dedicated to specific populations most often cite people with disabilities or women as the targeted beneficiaries.
- Very few foundations reported grants specifically intended to benefit LGBTQ populations.
- Many foundation websites stated policies that reference impartiality and fairness but did not include specific information on how these are implemented or demonstrated.

## What are Indiana Foundations doing?

### The Clowes Fund

Unique to family foundations is the fact that many family foundation boards are limited in diversity due to the fact that a majority of their board members come from the same family. Despite these limitations, the Clowes Fund has infused diversity, equity and inclusion into the values and culture of the organization and has made intentional hiring and funding decisions based on these values. According to Beth Casselman, CEO of the Clowes Fund, “Diversity, equity and inclusion are embedded into the fabric of our organization beyond an anti-discrimination statement.”

In 2003, as a reflection of this commitment the Clowes Fund identified Immigrants, Refugees and Asylees as a funding priority. While the Clowes family was very interested in this specific population (many of them have married immigrants), the foundation had also seen increasing requests from organizations that provided services to this population. Admittedly, the difference between recognizing this specific population as one in need and truly understanding their needs took some time. In 2009, the Clowes Fund determined that it needed to really focus in on this population and identified three priority areas. 1. English language training, 2. Access to legal services and 3. Mental health counseling and psychological services. To date, since this priority has been established, The Clowes Fund has awarded 156 grants to these specific populations totaling \$1,331,744.

# What are Indiana Foundations doing?

## Heritage Fund-The Community Foundation of Bartholomew County

In 2002, after significant board discussions about how they were advocating for the whole community, the Heritage Fund in Bartholomew County developed a Statement of Diversity and began including its mission and this statement on all reports, applications and other materials. Also around this time, the foundation began receiving feedback from the largest corporation in Bartholomew County that pushed The Heritage Fund to strengthen its efforts in the areas of diversity, equity and inclusion for the benefit of the whole community. In 2004, the Foundation began to lead important work with other partners to retain a diverse community workforce called the Welcoming Community Initiative. The Welcoming Community Initiative has been involved in surveying the community, developing the downtown area, special projects and activities and offering grants for partner organizations to do special projects. In the coming months, The Welcoming Community Initiative is getting ready to launch “Engage Columbus” which is an effort to create a physical place where community navigators will be able to help people connect to the community. According to Tracy Souza, President and CEO of The Heritage Fund, “We see people coming in and getting connected to other individuals of similar cultural background, finding out about

grocery stores that carry ethnic foods, receiving support for spouses who may be coming to this country for the first time and overall, helping people get connected to our community.”

To read more about the Welcoming Community Initiative, read this blog post by Tracy Souza: [www.cof.org/blogs/re-philanthropy/2014-10-28/creating-welcoming-community](http://www.cof.org/blogs/re-philanthropy/2014-10-28/creating-welcoming-community)



## Porter County Community Foundation

As a part of One Region ([www.oneregionnwi.org](http://www.oneregionnwi.org)) and The Race Relations Council of Northwest Indiana, The Porter County Community Foundation has been involved in community initiatives addressing diversity, equity and inclusion for several years. In 2010 a Commitment to Inclusiveness document was developed by the Race Relations Council (a spin-off of One Region) that includes statements about values, governance, administration, development, programs and action plans. Each organization participating in One Region has modified the document to meet their own needs and has adopted the Commitment to Inclusiveness for use in their own organizations. According to Barb Young, President of The PCCF, “In addition to working together among our own organizations, we feel as though the Race Relations Council is making a public statement about the importance of a commitment to diversity, equity and inclusion.”

In addition to its participation in regional efforts, The Porter County Community Foundation believes in the importance of training its grantees and other nonprofits in the community. In the past PCCF has brought in a diversity trainer to conduct diversity training with local nonprofits addressing the topic “How Do You Deal with Diversity in the Workplace and How to Work with Your Diverse Clientele.” In the near future, PCCF, working with Mayor’s Office in Valparaiso, hopes to participate in a Welcoming Community Initiative that will further their efforts as a foundation and as a key community partner.

# INCLUSION

## Inclusion Defined

Inclusion refers to the degree to which diverse individuals are able to participate fully in the decision-making processes within an organization or group.

### 2014 Member Website Review

- 8 foundations mentioned facilitation or participation in community discussions around diversity, equity and inclusion.
- 14 foundations mentioned specific grants for community diversity.
- 7 foundations mentioned funding diversity through arts and cultural activities.
- 10 foundations mentioned women's giving circles.

## Observations

- While some Indiana foundations report participating in community initiatives around diversity, equity and inclusion, many of them are still working toward full inclusion of diverse individuals in organizational or community decision-making processes.
- While we know that groups such as women's giving circles exist, many foundations do not highlight the work of these groups and the benefits that they provide for their communities.



# What are Indiana Foundations doing?

## St. Joseph County Community Foundation

Since 1999, The St. Joseph County Community Foundation has impacted African Americans in the South Bend area through their African American Fund. At the time of the fund's establishment, the foundation had the sense that there were strong, influential African American leaders in their community but that no one was bringing them together. Ten African American families were recruited to establish endowed donor-advised funds totaling \$100,000. Their lead gifts were matched by six organizations and all of these gifts were matched by a Lilly Endowment Challenge grant. All of the matching dollars established the African American Community Fund. A committee comprised of African Americans determine which initiatives and programs to support. Now, more than twenty endowed funds have been created by African American families and organizations with assets totaling over \$2.4 million. According to Rose Meissner, CEO, "This initiative was never just about the money. It is about engaging African American citizens as donors and giving a brighter spotlight to African American issues and their solutions. Everyone involved has felt from the beginning that if you make any part of our community stronger, we all get stronger as a result."

Also a fund of the St. Joseph County Community Foundation, the Charles Martin Touch a Life Scholarship Fund provides educational scholarships and paid internships to students. Charles Martin was a legendary figure in the community who worked tirelessly on behalf of young people in the community. With an initial fund established in 2008, the fund has reached \$750,000 and is a perfect example of inclusion; the grant committee making decisions about scholarship recipients is made up of individuals who were mentored by Charles.



## What are Indiana Foundations doing?

### Women's Giving Circles

Women's Giving Circles serve as an excellent example of inclusion in our philanthropic community. As a historically underrepresented group in philanthropy, women are now not only in the position to make decisions about their own giving to philanthropic causes but are able to come together with other women to collectively fund causes that are important to them and that in most cases, benefit other women.

### Community Foundation of Madison and Jefferson County

Established in 2012 as an effort to engage women in philanthropy and to expand the foundation's donor base, the Women's Giving Circle of the Community Foundation of Madison and Jefferson County has given over \$30,000 to causes that range from programs focused on young girls, parenting, literacy, food assistance, education and leadership. Funding recommendations are made by a subcommittee of women involved in the Giving Circle and the membership approves all grants. As an added benefit, Bill Barnes, President and CEO of the foundation says this about the Circle. "We thought this program would attract new donors, but we have been very impressed with the fact that 35% of the members in 2012 were first time donors from their household. In 2013, we saw 14% new donors and this year it is 18% through mid-October."

### Orange County Community Foundation

With a specific emphasis on women's health, the Orange County Community Foundation's Women's Giving Circle was established in October of 2011 (to acknowledge Breast Cancer Awareness month) and has funded several women's health programs or initiatives since its inception. According to Imojean Dedrick, Executive Director of the Foundation, "Women's healthcare needs in our community were going unnoticed. Regular annual check-ups were not something the average Orange County female made a priority." In responses to this need, the Circle has granted out over \$6,500 to programs that enhance women's health, access to health care and other services for women in need during illness and recovery. In addition to funding specific initiatives, the Circle also involves the community and other women in their efforts through fundraising events either hosted by the Circle or by individual members. These efforts have not only served to involve and inform women and other members of the community about the role they can play in philanthropy but have also raised over \$36,000 for the Women's Giving Circle.



# SUMMARY

We began this look into how Indiana foundations are approaching diversity, equity and inclusion as a way to help us know more about our members' interests and experiences in this topic. We have learned that it is a complex and sometimes challenging process to incorporate into an organization's policies and practices, but there is growing interest in considering philanthropic impact and meeting a community's needs through the lens of diversity, equity and inclusion. The foundations that offered examples of what this looks like in their organizations demonstrated that diversity goes beyond racial, ethnic, and gender boundaries, and that an intentional focus on diversity can facilitate progress. They acknowledged that understanding and fully reaching equity and inclusion takes time and careful effort, but doing so can enrich their own organizations as well as benefit the stakeholders they are trying to support. We're grateful to everyone that shared their stories, and look forward to continuing the conversation.



# PARTNERS



## About Our Funding Partner

The D5 Coalition is a five-year coalition working to advance diversity, equity, and inclusion in the field of philanthropy. D5 provides philanthropic organizations with tools and resources to help bring new voices and expertise to the decision-making table, and become more effective in their efforts to advance the common good. D5 has four big sector goals: recruit diverse leaders; identify the best actions for organizations to take; increase funding for diverse communities; and improve data collection to help measure progress. Learn more about the work of the D5 Coalition, and how your organization can help advance diversity, equity, and inclusion by visiting [d5coalition.org](https://d5coalition.org) today.



## About Our Research Partner

Established in 1956, the Foundation Center is the leading source of information about philanthropy worldwide. Through data, analysis, and training, it connects people who want to change the world to the resources they need to succeed. The Center maintains the most comprehensive database on U.S. and, increasingly, global grantmakers and their grants—a robust, accessible knowledge bank for the sector. It also operates research, education, and training programs designed to advance knowledge of philanthropy at every level. Thousands of people visit the Center's web site each day and are served in its five regional library/learning centers and its network of more than 470 funding information centers located in public libraries, community foundations, and educational institutions nationwide and around the world. For more information, please visit [foundationcenter.org](https://foundationcenter.org) or call (212) 620-4230.



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