



# Fund the People Toolkit

## Equity & Inclusion Collection





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**Invest In Equity Inside  
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# Invest In Equity Inside the Nonprofit Workforce

Fund the People envisions an inclusive nonprofit sector that supports a highly-inclusive, high-performing, high-impact, and high-endurance nonprofit workforce.

It is crucial to place equity and inclusion at the heart of investing in the nonprofit workforce. Organized philanthropy and the social sector will not end the deficit of investment in the nonprofit workforce until organizations have the incentives, political will, resources, and skills they need to build teams that reflect, understand, and represent America's diverse communities. On the other hand, we will not ensure equity and inclusion until we maximize overall investment in the nonprofit workforce.

Unfortunately, the issues of nonprofit human capital and equity and inclusion are not commonly addressed as a single challenge. Too often, the discussion on nonprofit equity and inclusion does not explicitly address the need for investing in the nonprofit workforce; and too often, the discussion on the nonprofit workforce does not explicitly address equity and inclusion.

The nonprofit workplace is not immune from the forces of unconscious bias and systemic racism. These and other pernicious social diseases are layered beneath outmoded myths that encourage us to treat staff and staff development as overhead, and expect unreasonable and counterproductive self-sacrifice from nonprofit professionals. Allowing these issues to fester has a detrimental impact on governance, management, fundraising, and ultimately, on the effectiveness and sustainability of nonprofits and their staff.

There are numerous instances when the lack of investment in nonprofit professionals diminishes the equity and inclusiveness of the nonprofit workforce. Here are *several examples* Fund the People has identified:

- **Unpaid Internships:** Unpaid internships are a major entry-point into nonprofit careers. But only people who can afford to forgo income can participate. This unintentionally filters out many non-college bound youth; community college students; first-generation college students; and people from low-income, working and middle-class backgrounds. Perhaps this filtering process is one of the reasons people of color represent only an estimated 17% of nonprofit board and executive ranks.
- **Compensation and Development:** Nonprofit compensation is generally below-market, particularly for social service and social justice jobs. In some cases, nonprofit workers who help to lift community members out of poverty are being paid poverty wages themselves. Compensation is also unequally distributed. For example, research from Bayer University shows that in the Pittsburgh, PA-area, women make up 74% of the nonprofit workforce, but make 74 cents on the dollar compared to their male colleagues. Staff development—widely desired by our workforce and often the counterweight to poor compensation—is generally the last to be added and first to be cut from nonprofit budgets. Our research indicates that nonprofits use 0-3% of their budgets for staff development, which is about 20% less than standard business practice. Lack of pay and development resources combine to create an exclusionary environment rife with high turnover among people with family responsibilities and without independent means.
- **Executive Transitions:** During nonprofit executive transitions, when organizations hire people of color, women, younger, and/or LGBTQ people as successors to long-serving white and/or male and/or straight and/or older executives, these new leaders are often unintentionally set-up to fail. For example, when funders take a “wait-and-see” approach to determine



whether or not the incoming leader is successful before they provide new or renewed funding, this negatively impacts the cash flow of the organization, and creates a negative view of the executive's ability to fundraise.

These challenges, of course, also offer a *plethora of opportunities!* For example:

- **Unpaid Internships:** Nonprofits can start offering well-paying internships and recruit far and wide to find diverse candidates for these roles. Funders can enable and encourage this by investing heavily in well-paid internships. Additionally, nonprofits can serve as hosts for apprenticeship programs that recruit and place diverse people in organizations. Organizations and their funders can also allocate funds for short and medium-term entry-level jobs and consultancies. This provides interns and apprentices an opportunity to continue contributing as they search for their next professional opportunities.
- **Compensation and Development:** Nonprofits can set strategic intentions and budgetary goals to offer sustainable compensation and robust staff development, and funders can reciprocate by allocating grant dollars toward these important priorities.
- **Executive Transitions:** Nonprofits can strive to develop a deep bench of diverse team members who become

plausible internal candidates for the executive director role. When they hire for diversity, they can also make sure to support incoming executives in fundraising success. Rather than taking a wait and see approach, funders can proactively reach out to new executives and provide runway funding to enable them to succeed from the start.

We recognize that investing in the nonprofit workforce is not a simple task; neither is ensuring equity and inclusion. But when done together, it creates a powerful and positive force in the lives of our people, organizations, and causes.

Fund the People is pleased to offer the [Literature Review](#) and [Annotated Bibliography](#) that accompany this statement. The Field Stories in our new Fund the People toolkit offer important examples of successful investment in equity and inclusion in the nonprofit workforce. We will continue to offer research and tools to help the field maximize equity and inclusion in the nonprofit workforce. Fund the People is committed to building a healthy organizational culture that is intentional about equity and inclusion. We take action on this in our hiring processes, in building our Advisory Council, in contracting with vendors, and throughout our work. We look forward to partnering with you on these efforts. To learn more, visit [fundthepeople.org](http://fundthepeople.org).



## About Fund the People



Fund the People is the national campaign to maximize investment in the nonprofit workforce. To achieve this goal, we make the case, equip for action, and build a movement to change the attitudes and behaviors of funders, fundraising nonprofits, and the intermediaries that support them. There is a long-standing, sector-wide deficit of investment in the nonprofit workforce. Nonprofit professionals work in environments typified by high burnout and stretched resources. So there is a real demand for equitable salaries and benefits, more and better professional development, improved

human resources functions, and healthy organizational culture. Together, we can address these challenges by reshaping existing resources to prioritize nonprofit people as the central asset of nonprofit performance. Now more than ever, we can ensure that America's civic leadership is diverse, well-supported, high-performing, and sustainable for the long haul. Launched in 2014 and headquartered in Beacon, NY, Fund the People (originally known as Talent Philanthropy Project) is a project of Community Partners. Our work is informed by an Advisory Council of diverse leaders and a team of skilled staff and consultants, and is supported by a coalition of regional and national foundations.

**To learn more about Fund the People visit:**  
[fundthepeople.org](https://fundthepeople.org)

## Acknowledgments

**Rusty Stahl** is President and CEO of Fund the People, which he founded in 2014. He is also a Visiting Fellow at New York University's Wagner Graduate School of Public Service. Connect with him on Twitter at @fundthepeople.

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**Fund the  
People Toolkit**

Equity & Inclusion  
**Literature Review**





# Literature Review

*This literature review is part of a suite of materials that explore the topic of investing in equitable and inclusive talent in the nonprofit workforce. It examines the ideas and practice that sit at the intersection of the nonprofit workforce, philanthropic behavior, and equity and inclusion and is based on practical literature developed by the nonprofit and philanthropic sectors, rather than by way of academic scholarship.*

Over the past several decades, the American nonprofit sector and its funders have come to champion diversity as a core value. There is a sweeping consensus that diversity should be both promoted through programming and services and mirrored by the nonprofit workforce itself. However, once discussion shifts from embracing principles to practicing diversity, from the meaning of diversity to how to achieve it, that consensus rapidly begins to unravel.

- Does diversity mean simply recognizing and celebrating difference, or does it require a proactive commitment both to combating inequality and building an inclusive society?
- Does diversity, in a U.S. context, primarily refer to race and ethnicity, or does it encompass the many other aspects of identity and power—including, but not limited to, gender, sexual orientation and gender identity/expression, dis/ability, socio-economic class, age, religion, and geographic location? How should the nonprofit sector address diversity internally?
- How should funders invest in equity and inclusion—beyond making grants—and instead help to build the philanthropic sector itself?

This paper serves two purposes. First, we lay out our thinking on how two critical agendas—talent-investment, and diversity, equity, and inclusion (DEI)—are fundamentally intertwined and mutually reinforce in

philanthropy and the nonprofit sector. Second, we explore this relationship between talent-investment and DEI through an extensive review of the practical field-based literature.

## Linking Diversity, Equity, and Inclusion with Talent Agendas

As Miecha Forbes of Koya Leadership Partnerships observes, “building a truly diverse organization requires more than just adding ‘diversity’ to the list of strategic goals and making a few key hires.”<sup>1</sup> The mission of Fund the People is to ensure that funders invest in a well-supported, high-performing workforce. Making nonprofit careers viable and appealing for a diverse population—especially members of the historically marginalized and disenfranchised communities that are engaged by so many nonprofit organizations—requires a fundamental commitment to investing in nonprofit talent. As we argue in our [Invest In Equity Inside the Nonprofit Workforce](#) statement, the talent-investment agenda is by nature diversity, equity, and inclusion agenda, and the equity and inclusion agenda is by nature a talent-investment agenda.

As part of our review of the prevailing literature, we surveyed existing tools, research reports, scholarship, and other resources. We knew going into this review that there is vast and rich literature on diversity in the nonprofit sector, and a smaller, but still significant, nonprofit literature addressing equity and inclusion beyond basic diversity. We also knew that the literature on talent-investment is small but growing. In our review, we found, perhaps not surprisingly, a paucity of resources addressing the funding of diversity, equity and inclusion (DEI) work, and that there are very few tools or research reports that analyze DEI in the nonprofit sector or among funders through the lens of talent. Our conversations with foundation program officers and nonprofit leaders, which we conducted specifically for this literature review, echoed these findings.





Our colleagues noted the urgent need for more narratives and more quantitative data connecting the funding of talent and DEI in the social sector.

## Defining Diversity, Equity, and Inclusion

Funders have grappled with how to address diversity—most commonly, racial diversity—since at least 1971, when members of the Council on Foundations demanded the association leadership encompass “Black professionals who demonstrated a commitment to a concept of philanthropy that addressed the needs of minorities and the poor.” Linking diverse talent to outcomes, the protesters decried “the scarcity of Black professionals working in the philanthropic sector” and called for their inclusion on “foundation staff, among trustees, and institutional decision-making and grantmaking.”<sup>2</sup> These efforts led to the formation of philanthropy’s first affinity group, the Association of Black Foundation Executives. Though the framing of “diversity, equity, and inclusion” (attended by its own acronym, DEI) is relatively recent, the issues at stake have been on the table for nearly half a century.

The question of *how* to diversify philanthropy and the broader nonprofit sector follows the question of *why* to prioritize promoting diversity, equity, and inclusion. Rockefeller Philanthropy Advisors, launching its 2008-2009 series of reports on diversity, effectiveness, and impact, tracked how the case for racial diversity shifted from “the moral thing to do” starting in the late 1960s to a human resources-focused legal imperative in the mid-1980s. But as the censuses of 1990 and 2000 documented the nation’s rapidly shifting racial and ethnic demographics, “many foundations began acknowledging the necessity of increasing their understanding of [poverty-related] issues and their potential solutions from the perspectives and cultural backgrounds of the populations they were trying to serve.” Moreover, a “marketplace” rationale for diversifying staff and boards took hold, and foundations realized that many of their largest grantees (e.g., universities, museums, and medical centers) were now serving increasingly diverse “customers.” However, advocates of this market-driven framework quickly discovered that hiring staff of color did not reflexively “translate to increased giving to diverse communities, or to more effective solutions.”<sup>3</sup>

Reviewing the lessons identified by the Diversity in Philanthropy Project (DPP)— the effort to increase the diversity and inclusiveness of the boards, staff, grant-making, and other operations of organized philanthropies was the predecessor of the D5 Coalition—Jessica Bearman, Henry A.J. Ramos, and Anna-Nanine S. Pond identified the most compelling reasons that embracing diversity, equity, and inclusion are essential to philanthropy’s success. First, as demographic shifts and the increasing complexity of enduring social problems require foundations to become learning organizations, “diverse perspectives increase team problem-solving capacity.” Second, when foundations reflect the broad, diverse communities they serve, the gap in experience and perspective between grantmakers and grantseekers will shrink. The resulting authentic relations between the two increase the likelihood that funding will have the desired impact on recipient communities and organizations. Third, DEI initiatives open the path for foundations committed to “expanding resources and dismantling structural barriers to equality... to remedy inequities among their philanthropic decision-making and grantee ranks.” These lessons, though directed at grantmakers, may help nonprofit leaders more generally frame their case.<sup>4</sup>

Talent-investment is absolutely essential to advancing DEI in the nonprofit sector and that, vice-versa, investing in DEI is equally critical to deepening, strengthening, and retaining the sector’s workforce. Defining what constitutes DEI is a prerequisite to achieving progress on these fronts. Indeed, while diversity, equity, and inclusion are all fundamentally interrelated, they are also distinct attributes, each needing to be approached with intentionality. The D5 Coalition, in its 2013 review of philanthropic policies, practices, and programs, explains that “diversity and inclusion focus, respectively, on people and processes; equity is about overall impact.” Moreover, D5’s report notes how the three terms are frequently conflated and confused in both concept and practice, and that an organization may be “committed to diversity but not inclusion, or to diversity and inclusion without taking the larger step toward equity.”<sup>5</sup> Numerous tools and resources explain each term; we draw our working definitions from those offered by the D5 Coalition, GrantCraft, the St. Paul Foundation, and the Annie E. Casey Foundation. In brief:



- **Diversity** refers to the wide range of differences among people and their perspectives
- **Equity**: while diversity and inclusion address internal change, equity focuses on external impact and outcome. Equity work takes a structural, systemic approach, drawing upon identifying and analyzing root causes of social injustice, devising solutions, and setting benchmarks for success. Equity is reached when disparities of resource distribution, opportunities, and burdens cannot be predicted or determined by race, ethnicity, gender, or other forms of inequality
- **Inclusion** means the action or state of inviting or of being invited within a group or structure including or of being included within a group or structure. More than mere numerical representation, inclusion involves authentic and empowered participation, especially in decision-making, along with a true sense of belonging<sup>6</sup>

The D5 Coalition report notes how a diverse workplace is not necessarily an equitable one and that the presence of diverse people in an organization does not guarantee decision-making beneficial to diverse populations. Moreover, notions and practices of diversity, equity, and inclusion may reinforce power differentials between those being included and those being excluded. In turn, a commitment to equity “recognizes and accounts for the complex interaction between the dynamics of identity, socio-economic forces, and policy and practice that operate in the environments in which philanthropic investments can occur.”<sup>7</sup>

Funders and nonprofits envision the scope of diversity in different ways. The D5 Coalition report, for example, analyzes “race and ethnicity, sexuality, gender, and ability” in foundation policies, practices, and programs.<sup>8</sup> Some resources and tools surveyed for this review took a comparably sweeping view of diversity, but the clear majority focused on race and ethnicity.

A few reports investigated talent-investment for LGBTQ members of the nonprofit workforce, while the tools and resources specifically addressing women in the sector are surprisingly rare. This gap likely reflects that women

comprise 75% of the American nonprofit and philanthropic workforce, according to a 2013 report from the University of Denver-Colorado Women’s College. However, that same study also showed that women comprised only 43% of top leadership roles.<sup>9</sup> Moreover, Guidestar’s 2015 Nonprofit Compensation Report found that the percentage of women in nonprofit CEO positions has decreased over the past decade, especially at smaller organizations. The report also found that the gender gap for CEOs persists, ranging from 6% to 23%, depending on the size of the organization.<sup>10</sup> Clearly, talent-investment must address gender equity and inclusion, especially for women of color; lesbian, gay, bisexual, transgender and queer people; or other people who are more likely to be disenfranchised based on their identities.

In tackling the “good intentions” and language of diversity, some foundation staff note that even funders with a specific commitment to addressing race are reluctant to explicitly mention it because they fear that such language is divisive, or because they see racial justice work as a subset of combating economic disparities. Cynthia Renfro, former director of programs and evaluation at the Marguerite Casey Foundation, warns that, “if it’s not stipulated explicitly, you lose the issue of race.”<sup>11</sup> The Annie E. Casey Foundation proclaims that “we are aware that race is central to any analysis of social conditions in America; it is equally central to any attempt to address those conditions.”<sup>12</sup> Ashley Stewart, senior associate for talent and leadership development at the Baltimore-based Casey Foundation, explains the foundation’s data-driven decision to frame its work in terms of race equity, rather than diversity:

*We have come to understand that without making sure our strategies produce equitable outcomes that allow all children to succeed, and without analyzing the data to understand how our work affects all populations, we are unlikely to achieve our mission. In our talent and leadership work, this means not only developing a talent pool that is diverse, but making sure that we use a race equity lens in all components of our work to effectively contribute to social change.*<sup>13</sup>

Sociologist Ellen Berrey, author of *The Enigma of Diversity: The Language of Race and the Limits of Racial Justice*, argues that “diversity is how we talk about race



*when we can't talk about race.*" Diversity—a "polite, positive, hopeful" term—she proposes has become a stand-in when an open discussion of race is too controversial or—let's be frank—when white people find the topic of race uncomfortable." At an historic moment when endemic police brutality has given birth to the #BlackLivesMatter movement, "watered down ... diversity talk is not enough"; instead of policies that promote justice, "we get a celebration of cultural difference as a competitive advantage... good for learning, good for the bottom line, even good for white people," she continues. While Berrey focuses on higher education and the corporate sector, her framing is critical for considering how funders and nonprofits approach diversity, equity, and inclusion in the social sector.<sup>14</sup>

In proposing that talent-investment is foundational to advancing DEI in the nonprofit sector, we recognize the central place that structural racism holds in shaping social, economic, cultural, and political disparities in the United States, past and present. We acknowledge those many other persistent disparities grounded in gender, sexual orientation, gender identity and expression, ability, socio-economic class, age, and other identities. Furthermore, we understand the intersectional nature of these dynamic, overlapping identities: for example, both an able-bodied, heterosexual, African-American woman and a gay, white man with an invisible disability are whole beings, experiencing their race, gender, sexual orientation, and dis/ability all at once.<sup>15</sup> The nonprofit workforce and the communities served by the social sector are comprised of individuals living these intersectional lives, and DEI and talent-investment strategies must take this into account. Moreover, those nonprofits and foundations developing inclusion strategies should consider how previous strategies have not adequately addressed the pressure to conform to an organizational culture. Kenji Yoshino's pioneering work on "covering"—showing how individuals alter their appearance, avoid behaviors commonly associated with their identity, refrain from advocacy on behalf of "their group," and manage their contact with other group members—holds urgent lessons for those strategizing investments in developing, recruiting, retaining, and promoting diverse nonprofit talent.<sup>16</sup>

## Changing the Lens

To expand investment in the nonprofit workforce with a fundamental commitment to, equity, and inclusion, we first need to re frame two of the sector's deeply entrenched narratives. The first, dating back to the mid-2000s, warns of a looming leadership crisis or deficit, presuming baby-boomer generation executive directors would soon begin to retire and that the sector lacks adequate replacements to fill the resulting vacancies.<sup>17</sup> Despite the dire forecast—one that conflates top-level executive leadership with management more generally—this has not come to pass; "the sky isn't falling," notes a 2012 Emerging Practitioners in Philanthropy (EPIP) report calling for investment in talent and leadership at all levels.<sup>18</sup> Second, a frequent refrain appearing throughout the literature is the challenge of recruiting diverse staff. David Brown, a managing director at Bridge Partners LLC, an executive search firm based in New Jersey, notes that "recruiting for diversity is harder on a tactical level for a couple of reasons. First, you have to work harder to break out of the usual networks, the usual sources, the usual databases. On top of that, the numbers are simply fewer, so you have to dig harder and make a much more concerted effort."<sup>19</sup> This point—grounded in genuine challenges facing nonprofit hiring managers—presumes that talent already exists and can be identified and recruited. As one of our colleagues confidentially explained to us, "you want a broad, diverse candidate pool, but so very often, you are concerned about making the wrong hire or no hire at all, and you have very limited resources to begin with, so you hire a candidate that someone in the group knows. There's a real fear of hiring the unknown, and this is a major obstacle to promoting DEI in hiring."

Balancing the immediate needs of a hiring committee and the sector-wide DEI and talent issues are not small tasks. As Vu Le, executive director of Rainier Valley Corps, explains, "the huge problem with our sector's diversity strategies is that they increase demand without increasing supply. Doing this just ups the burden that leaders of color have to bear."<sup>20</sup> Le's point underscores how both of the above narratives presume the scarcity of nonprofit talent—especially talent that reflects the diversity of the American population and those people served by the social sector, both at the executive level and throughout the nonprofit workforce. We do not



subscribe to this vision of scarcity. Instead, we bring a talent lens to the task of expanding, developing, supporting, retaining, and promoting nonprofit staff at all levels of the social sector workforce. While we fully recognize the value of executive leadership, we also recognize how, as Niki Jagpal and Ryan Schlegel write, “there is value in understanding that leadership can emerge from any level of an organization, not just the executive level.”<sup>21</sup>

Looking at the sector through this talent lens, we promote intentional investment in human talent *as part of any and every grant* to advance the performance and sustainability of grantees and nonprofit professionals. Current talent-investment is grossly inadequate; a recent review of Foundation Center data from 1992 to 2011 found that less than 1 percent of foundation dollars went to talent-investment.<sup>22</sup> We must increase investments in compensation and benefits; leadership, career, and professional development; executive transition management, and board development; healthy, sustainable workplace cultures; and in developing effective and equitable employment policies and practices. This approach does not necessarily call for foundations to establish new grantmaking or operating programs specifically focused on nonprofit talent. Rather, it is more practical and valuable for funders to integrate talent-investments into their existing grantmaking strategies, programs, and portfolios.

For funders and nonprofits alike, viewing both internal operations and external services through the lens of talent will be carried out parallel to the examination of racial equity and gender mainstreaming practices that many organizations have adopted in the last decade. In GrantCraft’s guide to grantmaking through a gender lens, William Ryan explains that:

*Consciously and unconsciously, grant makers use different “lenses” to help them understand a field, program, or organization. They might view the same landscape from several perspectives—for example, leadership, public policy, and community engagement—each time seeing something different. The lenses they choose shape their decisions.*<sup>23</sup>

GrantCraft’s guide to funding through a racial equity lens brings front and center the structural issues involved, explaining that:

*a “racial equity lens” brings into focus the ways in which race and ethnicity shape experiences with power, access to opportunity, treatment, and outcomes, both today and historically. It can also help grantmakers think about what can be done to eliminate the resulting inequities.*<sup>24</sup>

Whether or not a funder or a nonprofit consciously chooses to prioritize DEI and/or talent-investment, they are already looking through lenses that determine each choice they make. Moreover, for a variety of reasons, both historical and complex, those lenses generally skew to white, heterosexual, able-bodied, cisgender men.

## DEI and Organizational Culture

Adopting and integrating talent and DEI into an organizational structure may demand the challenging work of deliberately changing the source codes, which Tom David and Kathleen Enright describe as the “set of influences shaped by the organization[’s] founders and leaders”, that continue to underpin the “personalities, behaviors, and underlying assumptions” of a given organizational culture.<sup>25</sup> In particular, David and Enright highlight those unseen or unconscious aspects of organizational culture that:

*make culture both powerful and difficult to fully see and understand. Culture serves many important positive functions in building and strengthening organizations and enhancing their effectiveness over time. It can help ensure alignment of both values and effort and provides a shared sense of coherence, purpose and motivation. Culture can help establish and maintain appropriate standards of behavior and productivity and simplify the task of integrating new staff members into their jobs. But cultural norms can also constrain and control behavior in ways that may detract from the fulfillment of an organization’s mission.*<sup>26</sup>



This is evident in the 2014 Green 2.0 report on diversity in environmental organizations, which found that racial prejudice and discrimination do not explain the field's failure to build a racially diverse workforce. Instead, the authors conclude that “homogenous workplaces arise because of adherence to particular [organizational] cultural norms, filtering, network structure, and recruitment practices.” For example, environmental jobs are commonly advertised and new employees recruited in ways that introduce unconscious bias and facilitate the replication of the current workforce.<sup>27</sup>

Throughout the literature we surveyed, we found numerous references to the fundamental role organizational culture plays in perpetuating the cycle of the inability to attract employees of color, increased employee dissatisfaction, and inability to retain top talent.<sup>28</sup> This statement is supported by the 2011 CommonGood Careers' report on diversity, equity, and inclusion in the nonprofit workforce, which remains required reading for funders and nonprofit leaders working for DEI and talent-investment. CommonGood Careers found that nonprofit professionals frequently believe “that their employers value diversity, but that those values are not being translated into actions resulting in the creation of diverse and inclusive workplaces.”<sup>29</sup> In *The Voice of Nonprofit Talent*, nonprofit staff members noted two major themes in the failure of their organizations to create racially diverse and inclusive workplaces: “reliance on ‘empty talk’ but not action” and “the lack of staff diversity itself.” The authors found that “the actual diversity of an organization's staff was by far the strongest indicator to nonprofit employees of that organization's genuine commitment to diversity.” Even employees who believed their organizations truly “did value diversity” indicated that “these values were either not strategically implemented or not prioritized by management.” As one African-American female respondent, and a 16-year veteran of the sector reported, her employer “says they value diversity and inclusiveness but it is always the last item in the budget.”<sup>30</sup> Testimonials such as this and the literature more generally illustrate that the need to invest in diversity, equity, and inclusion and in nonprofit talent development are inseparable.

The Annie E. Casey Foundation's research on the recruitment, retention, and advancement of people of color

in the nonprofit sector starkly documents the impact of the failure to diversify even when the goal is to diversify. People of color make up only 18% of the U.S. nonprofit sector (1.1 million out of 6.1 million), as compared to 30% of the entire employed population. Digging into this disparity, the Casey Foundation identified how the sector loses people of color throughout the workforce lifecycle, from recruitment and hiring to retention and advancement to executive leadership. Low salaries, a scarcity of opportunities for career advancement, and a lack of organizational commitment all represented major factors in people of color choosing not only to leave their jobs but to exit the nonprofit sector altogether. The Casey Foundation pinpointed several key obstacles to people of color advancing within the sector, including the lack of mentoring; inadequate access to developmental networks; and entrenched cultural biases that envision executive leadership as the exclusive domain of white males.<sup>31</sup> These findings echo the Green 2.0 report in which structural forces and organizational culture combine to replicate the status quo, inadvertently hindering the sector's best intentions of fostering diversity, equity, and inclusion.

Robert Schwartz, former executive director of the Level Playing Field Institute, argues that “the best way to create diversity of thought is through diversification of the workplace and then by creating [an organizational] culture that truly values and rewards such differences.” Instead, Schwartz continues, “what we find is that organizations blame a lack of ‘cultural fit’ which further codifies a homogeneous staff by creating insiders and outsiders. The outsiders will usually leave.”<sup>32</sup> Philanthropy Northwest, drawing on its survey of two dozen foundation leaders, found that more than any specific policy or practice, organizational culture will determine how successful efforts to advance DEI turn out. In particular, “moving an organization toward greater diversity, equity, and inclusion requires intentional, committed and often courageous leadership,” especially from CEOs. Changing organizational culture “requires leaders to foster an environment that fosters learning,” along with “difficult and complex, but essential” conversations with board and staff about a broad range of identities and forms of inequality. Additionally, experimentation and peer networks for leaders, board members, and staff are critical components of putting DEI at the heart of





organizational culture.<sup>33</sup> David and Enright concur, acknowledging that “cultural forces are powerful precisely because they exist under the surface and are rarely identified and addressed, and some cultures can take time to transform.” They conclude that:

*Understanding and changing culture requires foundations to engage in self-examination to identify how organizational culture influences the way in which they see the world, interact with the world and assess opportunities for taking action... Transforming culture can also lead to changes outside a foundation — to its relationships; the roles it plays in its communities; and the perceptions of grantees, supporters and other stakeholders.<sup>34</sup>*

David and Enright’s observations about internal self-examination and external relationships, aimed specifically at foundations, can be applied to all nonprofits dedicated to putting DEI at the center of their organizations.

## Strategies and Tools

Though nonprofit organizations rarely adopt a talent lens, numerous tools exist for fostering a culture of DEI. Third Sector New England’s *Step-By-Step: A Guide to Achieving Diversity in the Workplace* is an excellent resource.<sup>35</sup> Funders aiming to support DEI through their grantmaking may wish to use the aforementioned GrantCraft guides for adopting gender and racial equity lenses.<sup>36</sup> Foundations and nonprofit leaders dedicated to racial equity may also want to consult the Annie E. Casey Foundation’s Race Matters collection, complete with self-assessment tools, impact assessment guides, issue briefs, and other resources.<sup>37</sup> Casey’s 2009 *Advancing the Mission: Tools for Equity, Diversity, and Inclusion*<sup>38</sup> and 2014 *Race Equity and Inclusion Action Guide: 7 Steps to Advance and Embed Race Equity and Inclusion Within Your Organization*<sup>39</sup> are also invaluable resources for DEI advocates. Additionally, the Philanthropic Initiative for Racial Equity’s 2009 report, *Racial Justice Grantmaking Assessment* includes the surveys used to conduct the evaluation.<sup>40</sup> All these tools outline the slow, deliberate, challenging path towards building individual and organizational buy-in to DEI work, ground their advice in building an organizational culture of learning, and emphasize the necessity of collecting data to ensure accountability. Casey’s 2014 race equity guide, for example, recommends:

- **Defining a shared understanding of, equity, and inclusion principles**
- **Engaging affected populations and stakeholders**
- **Collecting and analyzing data disaggregated by race, gender, and other available demographic categories**
- **Analyzing the systemic and structural causes of inequities**
- **Identifying strategies and targeting resources to address structural causes of inequities**
- **Assessing the impact of all policies and decision-making**
- **Continually evaluating effectiveness and adapting strategies as needed<sup>41</sup>**

Though they don’t explicitly address talent-investment, all of these recommendations can be adapted to inform and implement strategies designed to expand, retain, and advance an inclusive nonprofit workforce.

Currently, there is a scarcity of tools designed specifically to promote talent development and investment. We developed a toolkit to provide practical resources for grantmakers and nonprofits integrating talent-investment into their respective grantmaking and fundraising practices. The toolkit incorporates a DEI lens to make these resources even more useful and relevant to our foundation and nonprofit audiences. We also contributed an extensive practical guide to raising talent-development funding for the nonprofit community to Heather Carpenter and Tera Wozniak Qualls’s 2015 book *The Talent Development Platform*.<sup>42</sup>

The Leadership Learning Community’s 2009 “Leadership Development Investment Framework” is one of the earliest tools for helping funders determine how to support talent-investment. The framework assists funders in identifying current investment strategies and becoming more intentional, whether supporting individual development, systems change, or everything in between.<sup>43</sup> The National Committee for Responsive Philanthropy (NCRP), in its 2015 report on cultivating nonprofit leadership, proposed five concrete strategies for boosting leadership development:

1. **Begin or increase funding for leadership development**
2. **Integrate leadership development with program strategy**
3. **Engage with grantees as true partners**



#### 4. Use a culturally inclusive lens

#### 5. Build capacity that supports leadership development<sup>44</sup>

Though NCRP's report focuses on developing executive-level leadership in social justice organizations, its model can inform a broader vision of talent-investment at nonprofits making talent-investments at all levels within nonprofit organizations. What these resources all make clear is that although institutionalizing commitment and adopting a DEI and talent lens can take substantial time, thought, and commitment, doing so is essential to the organizational effectiveness of nonprofits and, by extension, the foundations that support their work.

### Funding: What's Happening?

*We all know that programs and strategies don't solve problems; people do. So why aren't more foundations making leadership development an integral part of their grant-making strategies?*

*If we agree that strong leadership is crucial to the success of the nonprofits we support, what is keeping us from maximizing the impact of our funding by investing more in the skills and capabilities of people who lead organizations, including staff and board members?*

*Unless we can figure out what is behind the nonprofit world's chronic underinvestment in leadership and turn things around, we will continue to overlook one of the most important ingredients of positive social change. Investing in leadership doesn't just deliver higher performance; it can also deliver a better, more equitable world.*

— Ira Hirschfield, president of the Evelyn and Walter Haas, Jr. Fund<sup>45</sup>

In a 2014 op-ed, Ira Hirschfield, president of the Evelyn and Walter Haas, Jr. Fund, contrasted the chronic lack of foundation funding for leadership development—less than 1% of grants made from 1992 to 2001—with the more than \$70 billion spent by U.S. corporations on training and development in 2013, up 15% from the previous year.<sup>46</sup> That same year, Laura Callahan of McKinsey & Company found that on a per-employee basis, the business sector spends \$120 per employee, per year, while the social sector spends just \$29.<sup>47</sup> While compar-

ing dollars spent in the nonprofit and for-profit sectors is a less than ideal metric, the relative lack of investment in nonprofit talent is apparent.

Despite the sector's professed commitment to diversity, data documenting concrete investment in promoting DEI remains sparse. A decade ago, in a controversial, politically loaded effort, the Greenlining Institute sought to measure the role foundations were playing in empowering minority communities to participate in public policy debates, only to receive a surprisingly “vehemently negative response” by funders:

*Greenlining requested information on grants from 35 foundations—only five actively cooperated. Most foundations simply ignored our repeated requests. Some stated they did not collect the data as requested. Some foundations were adamant that we should not complete the study. Almost all foundations that responded in some fashion argued the study would unfairly portray them as it would not measure the true impact their philanthropy was having on communities of color.<sup>48</sup>*

Attempts to collect similar data today and to better quantify funding for DEI-centered talent-investment remain scant, although the partnership between GuideStar, the D5 Coalition, and Green 2.0 launched in 2014 to develop standards for reporting diversity data in the nonprofit sector is a promising development.<sup>49</sup>

Sandra R. Hernández and Kurt C. Organista's short essay in the 2009 report from Rockefeller Philanthropy Advisors and the Council on Foundations, "Diversity in Action: Strategies with Impact", is a rare published account of funding for talent-investment specifically cultivating people of color. Hernández and Organista detail the San Francisco Foundation's longstanding “commitment to investing in “community risk-takers,” providing them the support to “become beacons of change leveraging the power of civic engagement.” Through two fellowship programs, the Foundation helps community leaders become “bridge builders” to the public, corporate, and philanthropic sectors. While its Multicultural Fellowship Program is not specifically framed as talent-investment for the social sector (fellows are placed in the Foundation's own grantmaking program), Hernández and



Organista note how it serves as a pipeline for employment in leadership positions in nonprofit organizations, philanthropies, and local government. Ultimately, they argue investment in the sector's diverse human talent is "prerequisite to effective programs, policy design, and systems change."<sup>50</sup>

All too often, funders and nonprofits have been hesitant to invest in talent and leadership. In its 2009 report, *Building LGBT Nonprofit Leadership Talent*, the Movement Advancement Project (MAP) documents that "nonprofits are reluctant to invest in strengthening their own leadership because these activities are perceived as a luxury." One nonprofit told MAP, "We would have felt too guilty to spend this money on ourselves."<sup>51</sup> This explanation came after MAP's 2008 career survey report, in which "many LGBT nonprofit staff members expressed dismay regarding current levels of support for development and training programs." (MAP's own research mirrored our findings, reporting that 0.9% of the grants in its database were directed to talent and leadership development for LGBT nonprofit staff members),<sup>52</sup> LGBT nonprofits also listed "low levels of general operating support [and] pressure from donors to achieve near-term results and keep overhead low" as high among the reasons for under-investing in talent and leadership.<sup>53</sup> Ultimately, MAP argues that grantmakers should help LGBT nonprofit leaders understand that it is "imperative ... to invest in their own development, and in systems that will build talent throughout their organizations," in order to fulfill the goals of the LGBT movement.<sup>54</sup>

More recently, the National Committee for Responsive Philanthropy (NCRP) has reported several perceived challenges to increasing investment in talent and leadership. One leading challenge is the question of whether and how to measure the impact of such investments. Given the turn toward strategic philanthropy in recent years, with its emphasis on quantitative data, leads many funders' to query how to measure success when presented with a proposal for leadership development. Niki Jagpal and Ryan Schlegel, writing for NCRP, did find examples of quantitative evaluation of the impact of talent-investments, such as the Evelyn and Walter Haas, Jr. Fund's Flexible Leadership Awards' "dashboard" measurements of budgets and mission-related accomplishments for organizations participating in the

program. The authors acknowledge the challenge of quantifying the individual and organizational impact of such investments, as "results are often complex, long-term and multidirectional." But they stress the value of anecdotal evidence illustrating how leadership investment facilitates better articulation of an organization's mission and promotes new partnership building.<sup>55</sup>

Jagpal and Schlegel report additional challenges to increasing investment in talent and leadership, including:

- **Decision-makers at the foundation level do not see the value of investing in leadership development**
- **The desire to continue funding current grantees prevents the grantmaker from adding leadership development**
- **There is a dearth of knowledge about which organizations provide good leadership development, as well as the needs of the sector**
- **Funders are focused on issue silos and outcomes**<sup>56</sup>

Adopting a talent lens acknowledges that talent-investment in nonprofits is integral to the effectiveness of funded programs and improves their odds of achieving success. Moreover, grantmaking through a talent lens dispenses with the false dichotomy of having to choose between funding current grantees programs and services, and investing in nonprofit talent. Anecdotal evidence is crucial to demonstrating the impact of such investments on the individual, the organization, and the community it serves. As Jagpal and Schlegel note, "moving the needle contributes to success even if the win is yet to come."<sup>57</sup>

## The Road(s) Forward

In their review of the Diversity in Philanthropy Project, Jessica Bearman *et al.* explain that for more than three decades, only a handful of foundations and funder networks have actively prioritized equity, and inclusion. For other funders, diversity and inclusion "have remained peripheral—something that might be important in principle, but not viewed as critical in practice." Furthermore, they note how in philanthropy, diversity and inclusion have been further marginalized by the siloed nature of the sector's infrastructure, including funder networks, advocacy groups, and research institutions.<sup>58</sup> Assessing the DPP's achievements and





challenges, Bearman *et al.* concluded that “no magic bullets and few existing tools are out there that make this work easier.” Moreover, “few, if any, models of successfully diverse, healthy learning organizations exist, in philanthropy or other sectors.”<sup>59</sup>

It is abundantly clear that these observations throw our mission into doubt; there are no magic bullets that will swiftly ensure the talent-investment the nonprofit sector needs to promote equity, and inclusion. But with the remainder of this literature review, we will focus on those DEI-centered efforts already underway to expand the sector’s talent pipeline. Strategic thinking is essential here. Kathleen Yazbak of The Bridgespan Group urges nonprofit leaders to begin developing talent pipelines “by thinking about how each position in the organization aligns with its strategic priorities” and, looking two to three years out, determining the skills and talent the organization needs to fulfill those priorities. These pipelines are important for nonprofit leaders looking to fill critical positions—including senior management—both on an immediate basis and down the road.<sup>60</sup>

In the long run, though, this is not only about filling such positions, but also about moving forward systemically with, as explained by David Day, an integrated system for not only designing jobs but developing employees to assume those jobs.<sup>61</sup>

A decade ago, Grantmakers for Effective Organizations helped pave the way for the nonprofit talent-investment movement with its two-volume series of reports, *Investing in Leadership*. Connecting executive leadership development to organizational effectiveness, GEO’s publications offer a framework, tools, and case studies for funders investing in human talent to help their grantees fulfill their missions.<sup>62</sup> In the ten years since then, it has become clear that there is no single definition of leadership development and no single road to talent-investment. Emerging Practitioners in Philanthropy’s “*Generating Change*” report offers funders a broad range of specific recommendations for investing in nonprofit talent and leadership development from recruiting and retaining individuals to supporting leadership development systems and organizational realignment to underwriting succession and transition planning programs to creating “encore” programs to re-engage experienced

or seasoned career professionals within the sector.<sup>63</sup> The National Committee for Responsive Leadership encourages programs that “sometimes take individual leaders away from their usual work environments and places them in authentic relationships with their peers” and provides the opportunity “to be of clear purpose and engage in self-reflection.” Such leadership cohorts “are able to build lifelong connections that deepen and evolve over time,” and their development is necessarily “relational, iterative, and dynamic.” Alumni networks help sustain these relationships and distinguish talent and leadership investment from one-time events and sabbaticals.<sup>64</sup>

One innovative approach to expanding the pool of diverse nonprofit talent is the partnership between Management Leadership for Tomorrow (MLT), the Annie E. Casey Foundation, and New York University’s Robert F. Wagner Graduate School of Public Service, and Leonard N. Stern School of Business. MLT, which originally set out to provide the training, coaching, and professional networks to support people of color entering the corporate world, recognized the urgent need to develop equivalent pipelines for the nonprofit sector. It partnered with Casey, Wagner, and Stern to launch the Social Sector Talent Initiative. The Initiative adapts MLT’s agenda to build “the hard and soft skills, provide “early exposure to high-impact career opportunities [and] understanding of the path to senior [management] levels,” and make available “inspiring leaders and mentors” from its corporate sector programs. Designed to build a pipeline to nonprofit management jobs for minority students, and early and mid-career professionals, MLT provides undergraduate career fairs and MBA career development boot camps, promotes a MBA/MPA dual-degree program through Stern and Wagner, and offers one-on-one coaching for MLT Fellows. In 2011 and 2012, the Initiative’s first two years, it supported 770 emerging nonprofit leaders of color, including placing 110 MLT Fellows at new jobs in the social sector.<sup>65</sup>

The Bush Foundation’s Native Nations Rebuilders Program represents some of the most sustained and comprehensive DEI talent-investment work. Begun in 2009 and now supporting its seventh cohort as of this writing, the program is a two-year leadership development and networking opportunity for the citizens of the 23



Native Nations sharing the Foundation’s service area of Minnesota and the Dakotas. In the first year, a cohort of roughly thirty Rebuilders followed a curriculum and participated in four in-person trainings, while in the second year, those fellows used that experience to design and implement action plans for their communities. Grounded in “the belief that effective governance is a fundamental factor for sustainable community and economic development,” the Foundation rejects any “one-size-fits-all” model for such work, and supports Native American tribes that “are engaged in redesigning governance systems—including collective decision-making, dispute resolution, and tribal elections.”<sup>66</sup>

Stephanie Andrews, talent development director at the Bush Foundation, explained that the Foundation “made a very intentional decision to support Native American leadership and to build experts from and within those communities.” The program is based on the premise that “if you want to move forward, you both need to get the idea right and properly support the people involved,” according to Andrews. She also observes that “the connections that Rebuilders make along the fellowship are critical to their experience when they go back to make change in their tribe. That support turns out to be as important as what they learn from trainings, and the cohort building component of the program is critical for that.” Discussing the Foundation’s commitment to both the Native Nations Rebuilders Program and DEI-based talent-investment more broadly, Andrews explains, “there are all these stories about why do grants fail. Often it’s not a failure of strategy, but that the person you were counting on left, or over-promised and over-committed what they could do. It’s all about the people, and yet we pretend that investing in people is outside of grantmaking.”<sup>67</sup>

## DEI and the Philanthropic Sector

Philanthropy faces the same challenges to recruiting, retaining, and promoting diverse talent as the broader nonprofit sector. ABFE’s 2014 report on the reasons that African-American staff members leave grantmaking institutions painted a bleak picture, as only 3% of philanthropic institutions are led by black chief executives and only 7% have black trustees. ABFE’s survey respondents reported that the failure to build pipelines, support systems, and more broadly, a culture of equity and

inclusiveness all underlie this ongoing exodus from the field. More specifically, black philanthropic professionals believed they lacked real opportunities for meaningful leadership roles and frequently felt their expertise was not valued by their colleagues in grantmaking decisions. More generally, they experienced isolation and tokenism at their institutions.<sup>68</sup> The Council on Foundations’ 2010 Career Pathways research echoed this, finding that nearly 80% of the 440 foundations that appointed new CEOs or executive directors during the years of its study were external hires, and nearly 50% came from outside the philanthropic sector—indeed, a quarter came from the corporate world.<sup>69</sup> One senior foundation official told the Council on Foundations researchers that:

*Because of the emphasis on diversity, there is more diversity in the program staff. But, as the research suggests, because of the tendency to go outside the field for CEOs, many of the well-prepared, diverse candidates within foundation program departments are being cut off at the pass, indicating that efforts to diversify lower staff positions is not the right way to influence and diversify leadership and executive positions.<sup>70</sup>*

No matter how successful programs for early and mid-career philanthropic staff might be, the field will continue to lose this talent without a clear commitment to retain and promote from within.

An in-depth analysis of, equity and inclusion issues specific to grantmaking institutions lies beyond the scope of this literature review. Those readers interested in further readings on DEI and the philanthropic sector may consult our annotated bibliography accompanying this review. Readings of particular interest include:

- **Several reports from the D5 Coalition, including *Analysis of Policies, Practices, and Programs for Advancing Diversity, Equity, and Inclusion* (2013), *Philanthropic Paths: An Exploratory Study of the Career Pathways of Professionals of Color in Philanthropy* (2014), *Advancing Diversity, Equity and Inclusion: Message Manual for the Field* (2013) and *State of the Work: Tackling the Tough Challenges to Advancing Diversity, Equity, and Inclusion* (2014)<sup>71</sup>**



- **Rockefeller Philanthropy Advisors’ three-volume series: *Philanthropy in a Changing Society: Achieving Effectiveness Through Diversity* (2008), *Diversity & Inclusion: Lessons from the Field* (2008), and *Diversity in Action: Strategies with Impact* (2009)<sup>72</sup>**
- **Emerging Practitioners in Philanthropy’s 2013 monograph, *The Next Generation Speaks: What Emerging Leaders of Color in Philanthropy Think About Race*.**<sup>73</sup>
- **The Saint Paul Foundation and Minnesota Community Foundation’s “Facing Race” framework, tools, hiring guidelines, and other resources for promoting racial equity both internally and externally**<sup>74</sup>

For foundations, as for nonprofits more broadly, there is no single path to embracing DEI. The mission and structure of a small community foundation or a family foundation with one paid staff member vary greatly from those of a national or global foundation. But being nonprofits themselves, funders will maximize their effectiveness by aligning their internal commitment to equity and inclusion with their public grantmaking.

The Bush Foundation’s Ron McKinley Philanthropy Fellowship illustrates how one funder has committed to promoting DEI in the philanthropic sector as well as in its broader talent-investment work. The program “prepares high-potential individuals from communities underrepresented in leadership positions in philanthropy for careers in the field.” Focusing in the immediate future on racial diversity, equity, and inclusion, the Minnesota Council on Foundations employs the McKinley Fellows in three-year positions at grantmaking institutions in Minnesota and the Dakotas. Over the course of the fellowship, participants receive extensive professional development and networking opportunities.<sup>75</sup> At the end of three years, the program helps Fellows find permanent employment, whether in philanthropy or elsewhere in the social sector. Stephanie Andrews of the Bush Foundation explains that in “saying that we want to improve the philanthropic sector in this region,” we have to ask “how do we create grantmaking leaders of color, not just hire people of color?” The fellowship program “is about modeling better behavior as an orga-

nization and learning lessons from when you diversify,” she continues, explaining that Bush is developing plans to share what it has learned. For the Bush Foundation, a commitment to talent-investment grounded in diversity, equity, and inclusion is not only about building external leadership, as through the Native Nations Rebuilders Program, but also about a commitment to developing diverse and inclusive internal leadership through the Ron McKinley Fellowship Program.<sup>76</sup>

## Conclusion

In this literature review, we set out to examine the interlocking connection between talent-investment and equity and inclusion, and to review the relevant resources and literature for practitioners. Despite the strong connection among the practices, there are few tools available to help funders and nonprofit leaders promote this agenda. Moreover, within DEI, much of the literature remains focused on diversity, with some attention given to equity and inclusion. However the sector has yet to fully commit to an equity-driven approach to changing external impact and outcome. But whether a funder or nonprofit puts a priority on combating inequities of all varieties—or takes a holistic approach to embracing diversity—one thing is clear from the existing literature: *promoting diversity, equity, and inclusion is an ongoing process, not a destination; an organization cannot simply hire its way to diversity.*

This literature review covers just a portion of the tools and resources that address the topics and readers interested in exploring DEI and talent-investment more extensively are encouraged to consult the annotated bibliography accompanying this review. Nevertheless it is apparent that we need more data and more stories. As Stephanie Andrews asks, “how can we collect stories of the places where we were so much more effective because of [our DEI work], having McKinley Fellows on staff, leading to grant applications from communities where we never previously had connections. We have new connections in communities before we make mistakes not knowing what we’re doing.” She explains that diversity, equity, and inclusion work is “a strategy for effectiveness, not just for inclusion” for its own sake—“it’s just the way we get better at our own work.”<sup>77</sup> After a half-century of discussing the deficit of diversity in the nonprofit sector without adequately solving the



problem, it is clear that investing in the talent pipeline to recruit, retain, advance, and fully support a diverse workforce is a critical missing piece of that puzzle. We hope that this literature review both opens the space for necessary conversations about these issues and provides practitioners with the tools and resources needed to concretely advance diversity, equity, and inclusion.

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<sup>11</sup> Villarosa and Potapchuk, *Critical Issues Forum: Moving Forward on Racial Justice Philanthropy*, 32. Another Philanthropic Initiative for Racial Equity report elaborates: “Without a clear definition of racism, its historic functions and contemporary manifestations, we cannot address the root causes underlying persistent racial disparities in education, health, housing, and other arenas. Establishing a common definition is especially important because explicit public discourse on matters of race rarely takes place in the United States. While race is always present and often central to public policy debates, it tends to lie hidden under the surface, cloaked beneath coded language or universal frames that can conceal the existence of racial inequities. When race is explicitly discussed, it is usually confined to a single issue, community, or moment in time, masking the real-life, cumulative effects of past and present policies in communities of color. Most efforts to address racism are limited to individual and interpersonal racial prejudice. While these efforts

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## About Fund the People



Fund the People is the national campaign to maximize investment in the nonprofit workforce. To achieve this goal, we make the case, equip for action, and build a movement to change the attitudes and behaviors of funders, fundraising nonprofits, and the intermediaries that support them. There is a long-standing, sector-wide deficit of investment in the nonprofit workforce. Nonprofit professionals work in environments typified by high burnout and stretched resources. So there is a real demand for equitable salaries and benefits, more and better professional development, improved

human resources functions, and healthy organizational culture. Together, we can address these challenges by reshaping existing resources to prioritize nonprofit people as the central asset of nonprofit performance. Now more than ever, we can ensure that America's civic leadership is diverse, well-supported, high-performing, and sustainable for the long haul. Launched in 2014 and headquartered in Beacon, NY, Fund the People (originally known as Talent Philanthropy Project) is a project of Community Partners. Our work is informed by an Advisory Council of diverse leaders and a team of skilled staff and consultants, and is supported by a coalition of regional and national foundations.

**To learn more about Fund the People visit:**  
[fundthepeople.org](http://fundthepeople.org)

## Acknowledgments

### Ian Lekus, Ph.D.

A Washington, D.C.-based consultant, possesses more than two decades of experience working at the intersections of research & analysis, program management, needs assessment, strategic planning, and evaluation. Dr. Lekus is passionate about building the capacity of the social sector to promote community empowerment and social inclusion. He served as Research Analyst and Operations Manager for Fund the People and as Philanthropy Research Fellow for Quality Enhancement for Nonprofit Organizations at the University of North Carolina Wilmington. With degrees from Duke and Cornell, Dr. Lekus has taught U.S. & international politics, protest movements and community organizing, and LGBTQ studies at Harvard, Tufts, the University of Georgia. Dr. Lekus can be reached at [ianlekus@gmail.com](mailto:ianlekus@gmail.com).

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**Fund the  
People Toolkit**

Equity & Inclusion  
**Annotated Bibliography**





# Annotated Bibliography

This annotated bibliography is a companion to our [Literature Review](#) on *Building an Inclusive Nonprofit Workforce*. It is part of a suite of materials in [Fund the People's Toolkit](#) on investing in equitable and inclusive talent in the nonprofit workforce. It explores ideas and practices at the intersection of the nonprofit workforce, philanthropic behavior, equity and inclusion. Rather than academic scholarship, this bibliography primarily consists of practical literature that comes from the nonprofit and philanthropic field. To keep this resource current as the field evolves, we welcome your feedback and ideas.

## Adams, Tom.

[\*Capturing the Power of Leadership Change: Using Executive Transition Management to Strengthen Organizational Capacity. Vol. 1 of Executive Transitions Monograph Series.\*](#)

Baltimore, Md.: Annie E. Casey Foundation, 2004.

This report highlights the challenges associated with executive transitions and describes the model of executive management transition that has been used in the last decade. It also details opportunities for funders to further develop and implement strategies to better cope with executive management transitions.

## Adams, Tom.

[\*Founder Transitions: Creating Good Endings and New Beginnings. Vol. 3 of Executive Transitions Monograph Series.\*](#)

Baltimore, Md.: Annie E. Casey Foundation, 2005.

This guide examines the unique challenges presented by the transitions of founders or long-term executives. It provides clear advice for executives and their boards in confronting the complex issues these transitions present.

## Adams, Tom.

[\*Stepping Up, Staying Engaged: Succession Planning and Executive Transition Management for Nonprofit Boards of Directors. Vol. 5 of Executive Transitions Monograph Series.\*](#)

Baltimore, Md.: Annie E. Casey Foundation, 2006.

This publication focuses on board leaders. It provides a set of practical perspectives, tools, case studies, and resources to help board chairs, officers, and members take a proactive approach to preparing their organizations for a transition. Includes a brief discussion of diversity, equity, and inclusion in the executive transition process.

## American Express NGen Fellows.

[\*“Changing the Status Quo: Intentional Succession Planning Through Leadership Development.”\*](#)

Washington, D.C.: Independent Sector, June 2011.

National studies and daily experience demonstrate the importance of succession planning in the nonprofit sector. Yet, the status quo persists: succession planning by accident. This report defines this problem and offers an alternative through summarized research and findings from four discussion groups of diverse professionals in the nonprofit sector. Includes rare discussion connecting DEI and talent-investment.

## American Express NGen Fellows.

[\*“Strategies for Talent Diversity: A Proposal for Improving the Racial and Ethnic Diversity at Nonprofit Organizations Across the Sector.”\*](#)

Washington, D.C.: Independent Sector, July 2014.

In September 2013, that year's cohort of American Express NGen Fellows issued a Request for Proposals (RFP) to Independent Sector member organizations.



The purpose of the RFP was to identify a pro bono consulting project. The goal of the project was to address a pressing leadership challenge the organization faced that was also relevant to the sector at large. Identifying strategies to improve the racial and ethnic diversity of staff at Audubon and across the nonprofit sector was the challenge chosen, using National Audubon Society as a case study. This document is the primary result.

**Annie E. Casey Foundation.**

[\*Race, Equity, and Inclusion Action Guide: Embracing Equity: 7 Steps to Advance and Embed Race Equity and Inclusion Within Your Organization.\*](#)

Baltimore, Md.: Annie E. Casey Foundation, 2014.

Advancing race equity and inclusion can sometimes seem daunting and often leaves many wondering how and where to start. One way to achieve social change in an organization is to incorporate race equity and inclusion at every stage of work. The seven steps in this guide provide a clear framework for undertaking this important work. This tool adds to the resources already created by partners who have been working in the field. It works by demonstrating how the perspective of a race and equity lens can be adopted by foundations or other organizations that work directly in affecting systems change, technical assistance providers, and communities.

**Bearman, Jessica, Henry A.J. Ramos, and Anna-Nanine S. Pond,**

[\*“Moving Diversity Up the Agenda: Lessons and Next Steps From the Diversity in Philanthropy Project.”\*](#)

The Foundation Review, Vol. 2, Issue 2, Article 8, 2010.

The Diversity in Philanthropy Project (DPP) was a three-year, voluntary effort of foundation trustees, senior staff, and executives of philanthropy support organizations committed to increasing diversity and inclusive practice across organized philanthropy’s boards, staff, grant-making, contracting, and investing. DPP had significant achievements, including mobilizing foundation leaders to commit to voluntary action on diversity and enhancing both the knowledge base and data methodologies available for understanding diversity, equity, and inclusion in foundation work. The initiative also faced its share of challenges, including difficulty assessing

the impact of the diversity performance of foundations, slow adoption of recommended principles and practices, and engagement of field stakeholders. DPP’s lessons are being incorporated into an effort to create and implement a sustained diversity strategy for the field involving a broad coalition of leading philanthropy organizations and networks. That five-year initiative in diversity—called “D5 Coalition”—represents DPP’s most significant outcome.

**BoardSource.**

[\*Diversity in Action: A BoardSource Toolkit.\*](#)

Washington, D.C.: BoardSource, 2011.

Diversity, equity, and inclusion are critically important for the sustainability of nonprofit organizations and the broader nonprofit sector, but putting them into practice isn't easy. That's why BoardSource has created the Diversity in Action toolkit. The downloadable PDF contains 19 tools designed to help boards increase their diversity and adopt the inclusive policies and practices that will create the culture needed to sustain an organization's commitment to diversity. The tools focus on helping readers:

- understand why diversity and inclusion are important
- build commitment to diversity and inclusion
- recruit new members with diversity in mind
- adopt inclusive practices and behaviors in board meetings
- measure and sustain progress

Readers will find case studies, sample policies and guidelines, and an action plan to equip them for the challenging task of ensuring that board members represent diverse points of view.

**BoardSource.**

[\*Leading With Intent: A National Index of Nonprofit Board Practices.\*](#)

Washington, D.C.: BoardSource, 2015.

Published since 1994, *Leading With Intent* is the only national survey to gather information from both chief executives and board chairs on their experiences in the boardroom. *Leading With Intent* identifies trends in board composition, policies, and practices and provides a detailed view of the challenges nonprofit boards face as they conduct their work.



**Branch, Renée B., ed.**

*Career Pathways to Philanthropic Leadership: Conversation on Diversity and Inclusive Practices.*

Arlington, Va.: Council on Foundations, 2010.

Highlights discussions from an October 2009 conference to discuss factors affecting diversity, equity, and inclusion in philanthropic leadership, including the most effective ways to prepare future leaders and recommendations for the Council on Foundation's Career Pathways Pipeline Program.

**Bridgestar.**

*"Building a Talent Pipeline."*

San Francisco, Calif.: The Bridgespan Group, 2010.

Many nonprofit leaders struggle with filling open positions in their organizations because of time and budget constraints. But being thoughtful about an organization's future talent needs can help an organization develop and maintain a steady stream of people to turn to when it's time to hire. This stream, or talent pipeline, helps nonprofit leaders fill critical positions quickly, and also helps them cultivate people who will be able to step into leadership roles—even at the senior management level—successfully down the road.

**Bridgestar.**

*"Building Leadership Capacity: Reframing the Succession Challenge."*

San Francisco, Calif.: The Bridgespan Group, 2011.

Why is developing future leaders so hard? A key reason may be that the sector tends to frame the issue very narrowly as "succession planning." This term generally brings to mind the search that accompanies the departure of an executive director. That search may be frantic or it may be well planned and executed. But in any case, it is an intermittent, isolated activity. In conversations with management experts and nonprofit executives alike, one thing already has become clear: The most successful succession planning is not a periodic event triggered by an executive's departure. Instead, it is a proactive and systematic investment in building a pipeline of leaders within an organization, so that when transitions are necessary, leaders at all levels are ready to act.

**Bridgestar.**

*"Interim Leadership: Looking Beyond the Executive Director."*

San Francisco, Calif.: The Bridgespan Group, 2009.

Hiring the wrong person into a senior leadership position is one of the most damaging and costly (in every sense of the word) mistakes an organization can make. At the same time, few nonprofits have the executive bench strength to function well with a key position vacant. Factor in the length of time that's often required to find the right person, and it's easy to see why the temptation to settle for someone who's "almost right" can be so strong. In recent years, some nonprofit organizations have started using interim executive directors as a way of avoiding this pitfall, and there is a growing body of knowledge and resources around this practice. However, there is still very little information on the use of interim personnel in other leadership positions. In this light, the authors look at the experience of one organization in this area.

**Bridgestar.**

*"Recruiting Diverse Talent."*

San Francisco, Calif.: The Bridgespan Group, 2009.

Piece quoting sector leaders on challenges to and recommendations for recruiting a diverse nonprofit workforce.

**Bush, Linda.**

*Building LGBT Nonprofit Leadership Talent: Thoughts and Suggestions for LGBT Organizations and Funders.*

Denver, Colo.: LGBT Movement Advancement Project, November 2009.

Based on 18 months of research, *Building LGBT Nonprofit Leadership Talent* published by the Movement Advancement Project (MAP) examines why intentional and consistent action to support, nurture and strengthen leadership talent should become an ingrained part of how lesbian, gay, bisexual and transgender (LGBT) movement organizations conduct their day-to-day work. The report also offers practical recommendations for prioritizing the development of LGBT leadership.



The report also includes a series of appendices, including a list of leadership development programs currently serving LGBT nonprofits, a leadership snapshot assessment tool, a list of recommended open-enrollment leadership development programs, and more.

**Chandler, Arnold, Lisa Quay, and Tia Elena Martinez.**

[\*Philanthropic Paths: An Exploratory Study of the Career Pathways of Professionals of Color in Philanthropy.\*](#)

Chicago, Ill.: D5 Coalition and Forward Change, 2014.

This study, commissioned by the D5 Coalition, provides a nuanced picture of the career experiences of 43 philanthropic professionals of color, ranging from program officers to CEOs working in an array of foundations. Through an exploration of the perceptions, analyses, and career histories of these individuals working in the philanthropic sector, this study aims to advance the field's understanding of potentially common points of entry and career pathways among professionals of color in philanthropy, as well as the factors that helped shape those pathways.

**Chao, Jessica, Julia Parshall, Desirée Amador, Meghna Shah, and Armando Yañez.**

[\*Philanthropy in a Changing Society: Achieving Effectiveness Through Diversity.\*](#)

New York: Rockefeller Philanthropy Advisors, April 2008.

Analyzes diversity programs funded by foundations since the early 1990s, both in personnel and giving, with a focus on racial and ethnic diversity. Includes a review of progress within foundations, a summary of programs and tools, and recommendations.

**Cornelius, Marla, Patrick Corvington, and Albert Ruesga.**

[\*Ready to Lead? Next Generation Leaders Speak Out.\*](#)

San Francisco: CompassPoint Nonprofit Services, The Annie E. Casey Foundation, the Meyer Foundation, and Idealist.org, 2008.

A skilled, committed, and diverse pool of next-generation leaders would like to be nonprofit executive directors in the future, according to a national survey of nearly 6,000 next-generation leaders. However,

the survey also finds that there are significant barriers which may prevent many younger nonprofit staff from becoming executives: work-life balance, insufficient lifelong earning potential, lack of mentorship and overwhelming fundraising responsibilities.

**Cornelius, Marla, Rick Moyers, and Jeanne Bell.**

[\*Daring to Lead 2011: A National Study of Nonprofit Leadership.\*](#)

San Francisco: CompassPoint Nonprofit Services and the Meyer Foundation, June 2011.

From the authors: “Our third *Daring to Lead* report in ten years comes at an extraordinary time to be the executive director of a nonprofit organization. Since our last report in 2006, powerful forces have influenced the requirements of—and the possibilities for—embodying the role well. Executives are daring to lead through a deep recession that resulted for many in fewer resources and increased demand for services, yet executives leading critical social change efforts are experiencing greater opportunity and organizational growth. And we know more about how the sector is experiencing the generational handoff, about what works in developing future leaders, and about which executive and governance practices are most associated with sustainable organizations. This report is organized around three key findings and concludes with corresponding calls to action.”

**Corvington, Patrick A. and Frances Kunreuther.**

[\*Next Shift: Beyond the Nonprofit Leadership Crisis.\*](#)

Baltimore, Md.: Annie E. Casey Foundation, 2007.

This is the second monograph in a series on generational shifts in the nonprofit sector. In this monograph, the authors counter a variety of proposed interventions from infrastructure organizations and present an alternate to the current crisis framework of a deficit of leaders in the nonprofit sector. The authors posit that by applying a crisis framework to the transitional trends in the nonprofit sector, leadership ignores the rich opportunities that lie ahead by more fully engaging people already working in the nonprofit sector. The authors make suggestions as to how the nonprofit sector can embrace this time of change and bring about positive outcomes.





**David, Tom and Kathleen Enright.**

[\*The Sources of Foundation Culture.\*](#)

Washington, D.C.: Grantmakers for Effective Organizations, October 8, 2015.

This publication begins an exploration into the set of influences shaped by grantmakers, founders, and leaders that affect organizations' internal cultures. Funders can use this document to support conversations among board and staff to articulate and understand the origins of organizational assumptions, examine beliefs and behaviors, and identify aspects of culture that drive or impede effective work. Many foundations' internal cultures have corporate, banking, or academic "source codes" — a set of influences shaped by the organizations' founders and leaders. Foundations have an extraordinary opportunity to rethink and reinvent outdated aspects of their cultures while building on long-standing strengths. While not explicitly about either DEI or talent-investment, understanding source codes is critical to addressing these issues in the field.

**Ditkoff, Susan Wolf and Libbie Landles-Cobb.**

[\*Leadership Pipelines Initiative: Cultivating the Next Generation of Leaders for Jewish Nonprofits.\*](#)

San Francisco, Calif.: The Bridgespan Group, March 2014.

Like the general nonprofit sector in the United States, the vast majority of Jewish nonprofits must find new executive leadership in the next several years. Finding the right leaders to move immediately into these openings is already proving difficult. To better understand why, a group of Jewish funders hired The Bridgespan Group to gather input from across the field and to help develop an action plan to address the most critical challenges facing Jewish leadership pipelines.

Two themes emerged about why the field's more traditional institutions are struggling to find the leaders they need: First, the field of Jewish nonprofits is not sufficiently developing and advancing the leaders it has. Second, many Jewish organizations don't have the value proposition to attract and retain the leaders they need.

**Dressel, Paula and Gregory Hodge.**

[\*Analysis of Policies, Practices, and Programs for Advancing Diversity, Equity, and Inclusion.\*](#)

Chicago, Ill.: D5 Coalition, November 2013.

To support leaders in their efforts to take meaningful action to address diversity, equity, and inclusion (DEI) in their organizations, D5 commissioned JustPartners, Inc. to identify the most effective policies, practices, and programs for reaching this goal. The *Analysis of Policies, Practices, and Programs for Advancing Diversity, Equity, and Inclusion* is a useful tool for foundation staff, leadership and other members of the philanthropy community who want to take action to advance DEI. It provides a comprehensive scan of existing written and web-based resources from philanthropy and the more general fields of organizational effectiveness and social justice in order to identify existing policies, practices, and tools that can inform and guide philanthropic action.

**Dubose, Derwin.**

[\*"The Nonprofit Sector Has a Ferguson Problem."\*](#)

Nonprofit Quarterly, December 5, 2014.

Lacking substantive input on how nonprofits should serve them, people of color are relegated to being mere recipients of philanthropy rather than becoming active partners in their communities' success. The nonprofit sector has a moral and programmatic imperative to keep pace with the nation's growing diversity, and Ferguson presents a catalytic moment to make real change.

**Eagly, Alice H. and Linda L. Carli.**

[\*"Women and the Labyrinth of Leadership."\*](#)

Harvard Business Review, September 2007.

When you put all the pieces together, a new picture emerges for why women don't make it into the C-suite. It's not the glass ceiling, but the sum of many obstacles along the way. Labyrinths represent a complex journey toward a goal worth striving for. Passage through a labyrinth requires persistence, awareness of one's progress, and a careful analysis of the puzzles that lie ahead. For women who aspire to top leadership, routes are full of twists and turns, both unexpected and expected. Because all labyrinths have a viable route to the center, it





is understood that goals are attainable. If we can understand the various barriers that make up this labyrinth, and how some women find their way around them, we can work more effectively to improve the situation.

**Eder-Van Hook, Jackie.**

“Interim Executive Management: Seven Benefits to Consider.”  
San Francisco, Calif.: The Bridgespan Group,  
January 2015.

A nonprofit organization that loses a top leader (e.g., chief staff officer, CEO, executive director, executive vice president) faces an anxiety-producing situation. But losing an executive without a succession plan in place can be particularly agonizing. In such a situation, a nonprofit’s board may feel forced to begin an immediate search for a new executive without reflecting on how it might best fill the short-term gap, and allow time to consider the organization’s longer-term future. To help bridge these gaps and create the necessary pause, organizations increasingly are engaging professional transition consultants as interim executives. These consultants offer nonprofits a viable alternative to entering recruitment mode immediately or to appointing a staff or board member simply to “hold down the fort.”

**Enright, Kathleen P.**

[\*Investing in Leadership: Volume 2: Inspiration and Ideas from Philanthropy’s Latest Frontier.\*](#)  
Washington, D.C.: Grantmakers for Effective Organizations, February 2006.  
From the authors: “In Volume 1 of GEO’s *Investing in Leadership* series, we reviewed the current thinking on leadership development and its connection to nonprofit results. In this volume, we shift the focus to the current state of practice among grantmakers. More specifically, we try to make a connection between the conceptual framework and theory described in the first volume and what people are doing on the ground. Our approach is to present concrete examples of grantmakers’ investments in leadership development and to draw out promising practices and lessons learned. This volume is intended for donors, staff members, and leaders of grantmaking organizations and giving programs who are thinking about how best to support the nonprofit sector’s most precious asset: its people. Our focus,

however, is not only on the individuals who are taking part in leadership development activities. In fact, we are more interested in the impact of leadership development on their organizations and, more broadly, the results those organizations achieve. The question is how leadership development can be thought about, designed and structured to produce beneficial outcomes for organizations, as well as the clients and causes they serve.”

**Fernandez, Amanda.**

[\*“Diversity and Community Engagement: Essential to Nonprofit Impact.”\*](#)  
San Francisco, Calif.: The Bridgespan Group,  
October 22, 2014.

Blog post discussing how Teach for America has learned important lessons about how it doesn’t invest enough in being part of the communities it serves or in figuring out ways to reflect these communities in their ranks. In the early part of TFA’s 25-year existence, its teachers were perceived as a predominately white and affluent corps serving two years in low-income black or Latino communities. In 2014, TFA had its most diverse group of teachers ever entering high-need classrooms across the nation. Fifty percent of its teaching corps identified as people of color, compared with less than 20 percent of all teachers nationwide. TFA also realizes that the ways in which it engages with communities must change as well.

**Forbes, Miecha.**

[\*“Becoming a More Diverse Nonprofit: Making Your Values Tangible.”\*](#)  
San Francisco, Calif.: The Bridgespan Group,  
June 17, 2015.

Building a diverse organization requires more than just adding “diversity” to the list of strategic goals and making a few key hires. To really transform a nonprofit into one where diversity of thought, experience, race, ethnicity, socioeconomic background, physical abilities, and work style is woven into the fabric of the culture, it needs to begin by defining diversity as an organizational value and creating an environment in which all employees can truly live into that value.



**The Greenlining Institute.**

[\*Investing in a Diverse Democracy:\*](#)

[\*Foundation Giving to Minority-Led Nonprofits.\*](#)

Berkeley, Calif.: The Greenlining Institute, 2007.

This study yielded a complex set of findings. Overall, investment in minority-led nonprofits remains startlingly low. For example, when a single outlier grant is removed from the grantmaking of the nation's largest independent foundations, a mere 3.6% of dollars are granted to minority-led nonprofit organizations. Individual foundations vary widely in their investments in minority-led organizations. Some have emerged as leaders in this field; others invest practically nothing in minority-led organizations. The study examined three samples: national private (often referred to as "independent") foundations, California private (or "independent") foundations, and California community foundations. In all three samples, the study examined data from foundation giving in 2004.

**Halpern, R. Patrick.**

[\*Workforce Issues in the Nonprofit Sector:\*](#)

[\*Generational Leadership Change and Diversity.\*](#)

Kansas City, Mo.: American Humanics, May 2006.

Includes a bibliography on nonprofit sector workforce issues, a selected annotated bibliography, and a summary of the author's research. The topically organized bibliography covers research on workforce issues facing the nonprofit sector today, including workforce diversity and inclusiveness, workforce pipeline, leadership development, volunteer management and fundraising professionals, subsector workforce trends and needs, nonprofit sector careers, and general trends in the U.S. workforce.

**Hayes, Julie.**

[\*"Is the Nonprofit Sector Doing Enough for Diversity?"\*](#)

Diversity Journal, November 9, 2012.

Many employees and supporters of nonprofit organizations are expressing concern that the sector is not keeping up with the greater need for a diverse workforce and is failing to translate the importance of diversity, equity, and inclusion into decisive action. With diversity and inclusion figures this low, the nonprofit sector is

challenged with uncovering the source of the problem, as well as finding which steps to take to make organizations' diversity and inclusion goals a reality.

**Hewlett, Sylvia Ann.**

[\*"Don't Dismiss Your Gen X Talent."\*](#)

Harvard Business Review, February 16, 2012.

Although Gen X has been overshadowed by the demographic behemoths bracketing them, no company can afford to ignore them. Until recently, economic constraints have kept them in their current jobs. But as the recession loosens its grip, well-qualified X'ers will soon have many suitors vying for their abilities and ambitions. Smart organizations will seek to understand what motivates them in order to sustain, retain, realize, and maximize their potential.

**Hewlett, Sylvia Ann, Melinda Marshall, and Laura Sherbin.**

[\*"Looking for Innovation in All the Wrong Places."\*](#)

Stanford Social Innovation Review, September 12, 2013.

Thought piece distinguishing "inherent" and "acquired" diversity and connecting acquired diversity to innovation. While focused primarily on the for-profit workforce, its analysis is quite relevant to DEI in the nonprofit sector.

**Hubbard, Betsy.**

[\*Investing in Leadership: Volume 1:\*](#)

[\*A Grantmaker's Framework for Understanding Nonprofit Leadership Development.\*](#)

Washington, D.C.: Grantmakers for Effective Organizations, June 2005.

Given the vast literature on leadership development and the challenges of translating research and theory into practice, this publication explores a sampling of the leadership development literature. It is designed as a first step to help inform grantmakers by highlighting: 1) the importance of leadership in the nonprofit sector, 2) dominant theories within leadership research, 3) different approaches to developing leadership and investing in nonprofit capacity, 4) the link between leadership development and organizational performance, and 5) steps to advance the field of nonprofit leadership development.



**Jagpal, Niki and Ryan Schlegel.**

[\*Cultivating Nonprofit Leadership: A \(Missed?\) Philanthropic Opportunity.\*](#)

Washington, D.C.: National Committee for Responsive Philanthropy, March 2015.

From 2003 to 2012, the country's top foundations dedicated only 0.8 percent of total grants to nonprofit leadership development. And yet, as shown by recent historic progress on immigration, criminal justice and in other social justice movements, we need leaders who are strong, skilled and connected to successfully realize positive, social change. What kind of leadership development do social change-makers need to be successful? How can foundations measure the impact of leadership development? What are the most common barriers to funding such programs and how can we overcome these challenges? What can we learn from foundations that are already supporting transformational leadership development, and from the recipients of such support? This report answers these questions and offers recommendations to foundations that wish to invest in the current and future leaders of social justice movements:

**Jung, Soya with Maggie Potapchuk, Riku Sen, and Lori Villarosa.**

[\*Catalytic Change: Lessons Learned from the Racial Justice Grantmaking Assessment.\*](#)

Washington, D.C. and Oakland, Calif.: Philanthropic Initiative for Racial Equity and Applied Research Center, May 2009.

This report shares lessons learned from piloting a Racial Justice Grantmaking Assessment developed by the Applied Research Center (ARC) and the Philanthropic Initiative for Racial Equity (PRE) with the Consumer Health Foundation, and the Barr Foundation.

**JustPartners, Inc. and Annie E. Casey Foundation.**

[\*Advancing the Mission: Tools for Equity, Diversity, and Inclusion.\*](#)

Baltimore, Md.: Annie E. Casey Foundation, 2009.

Workplace racial inequity exists. When racial diversity, equity, and inclusion are understood as mission-relevant to an organization, strategies for achieving these take precedence and permeate the culture. This toolkit

condenses 15 years of the Annie E. Casey Foundation's employee work "hard-wiring" diversity, equity, and inclusion as part of the cultural norm from management to staff to grantees to vendors. This toolkit addresses nonprofit internal operations, following up on the Foundation's 2006 *Race Matters* toolkit and related resources.

**Keleher, Terry, et al.**

[\*Leadership and Race: How to Develop and Support Leadership that Contributes to Social Justice.\*](#)

Oakland, Calif.: Leadership Learning Community, July 2010.

Leadership programs can help solve racial inequalities in access to education, healthcare, income, and wealth, but many approaches to leadership development actually maintain and promote racial inequalities. The report suggests that a large number of leadership programs associate leadership with equal opportunity and individualism. This thinking does not recognize that current systems (i.e., policy, culture, and institutional practices) can cause racial identity to limit one's access to life opportunities. It also focuses too narrowly on changing the behavior of individual leaders. The report shares an approach that will help participants work together to tackle the systems that maintain racial inequalities.

**Kelly, W. Sean and Christie Smith.**

[\*What If the Road to Inclusion Were Really an Intersection?\*](#)

Westlake, Tex.: Deloitte University Leadership Center for Inclusion and Deloitte University Press, December 11, 2014.

Argues that while traditional diversity, equity, and inclusion frameworks have helped bring more diverse talent into organizations, what got organizations here will not get them where they want to be. An intersectional approach that reaches all facets of corporate life is often more fruitful; conclusions certainly apply to DEI in the nonprofit sector.

**Kennedy, Sean.**

[\*Towards a More Responsive Philanthropy: Grantmaking for Racial Equity and LGBTQ Justice.\*](#)

New York: Funders for LGBTQ Issues, 2012.



In 2007, Funders for LGBTQ Issues launched its LGBTQ Racial Equity Campaign, a multi-year initiative to increase grantmaking to and strengthen lesbian, gay, bisexual, transgender, and queer (LGBTQ) people of color (POC) organizations and communities. Funders for LGBTQ Issues sought to forge a conversation among funders about the critical intersection of racial equity and LGBTQ justice and how institutional structures and grantmaking practices impact the resources available to diverse communities. This report marks another step to advance work at the intersection of racial equity and LGBTQ justice by offering the stories of five foundations that have made an intentional commitment to do this work with their grantees. It presents their innovative efforts in hopes that they'll encourage others who are engaging in or considering similar efforts.

**Kunreuther, Frances.**

[\*Up Next: Generation Change and Leadership of Nonprofit Organizations. Vol. 4 of Executive Transitions Monograph Series.\*](#)

Baltimore, Md.: Annie E. Casey Foundation, 2005.

Research indicates that leadership transitions from Baby Boomers to Generation X and Generation Y will become more common within the nonprofit sector. This report delivers a series of recommendations on how a variety of stakeholders can improve the hand off from this generation of leaders to the next.

**Landles-Cobb, Libbie, Kirk Kramer, and Katie Smith Milway.**

[\*"The Nonprofit Leadership Development Deficit."\*](#)

Stanford Social Innovation Review, October 22, 2015.

SSIR's new article highlights the results from their survey of 438 nonprofit C-suite executives on how well their organizations are finding, developing, and retaining the high-quality leaders they need for the future.

In survey after survey, succession planning is identified as the number one organizational concern of America's nonprofits. This data should be a significant wakeup call to nonprofit leaders, board members, and funders, and the article outlines key steps all three groups can take to help nonprofit organizations solve their succession problem and slow a turnover treadmill that is draining talent.

**Le, Vu.**

[\*"Waiting for Unicorns: The Supply and Demand of Diversity and Inclusion."\*](#)

Nonprofit With Balls, March 2, 2015.

Blog post that discusses the failure of well-intentioned diversity initiatives and calls instead for investments to expand the supply of nonprofit leaders of color.

**Lehman, Ann.**

[\*"Need for Diversity at Nonprofits is More Vital After Garner and Brown Cases."\*](#)

The Chronicle of Philanthropy, December 19, 2014.

Today we can learn much about diversity from a place that nonprofits probably wouldn't think to turn: the business world. Studies of for-profit companies done by Catalyst, Credit Suisse, Center for Talent Innovation, and McKinsey demonstrate that diversity in the for-profit world can increase financial performance, boost an organization's reputation, help attract talent, and promote stability and innovation. Many people believe the same is true in the nonprofit world. Greater diversity helps expand the pool of donors willing to support charities, improves the quality of strategic thinking at organizations, and makes them more responsive to the needs of clients and better able to attract the most talented workers.

[\*LGBT Career Survey Report: Understanding Attitudes Toward and Experiences of Working in the LGBT Movement.\*](#)

Denver, Colo.: LGBT Movement Advancement Project, November 2008.

What are people's attitudes toward and experiences working in LGBT nonprofit organizations? The *LGBT Career Survey Report* examines findings from a 2008 survey of nearly 2,000 individuals. The goal of the survey: to promote better understanding of what people who work in the LGBT movement think about their organizations' hiring and employment practices. Topics assessed include organizations' ability to attract top job candidates, develop and promote from within, retain talented staff, and discipline or move out poor performers. The *LGBT Career Survey Report* presents the findings of the first known survey seeking to understand how people who work for the LGBT movement think about their



work, employers, careers and professional development. In fielding the survey, MAP sought to understand LGBT people's attitudes towards working in LGBT nonprofit organizations; to get a better sense of the actual experience of working in an LGBT nonprofit from those who currently or formerly worked in the movement; and to take an initial step toward understanding what the movement needs to do to better attract, retain and develop a high-performing workforce.

**Linnell, Deborah.**

[\*"Boards and Leadership Hires: How to Get It Right."\*](#)

Nonprofit Quarterly, Spring 2008.

How a board handles a leadership transition can have powerful and long-lasting effects. This article discusses how the board's handling of this pivotal moment can result in long-lasting problems and what the board can do to get it right.

**LM Strategies.**

[\*The Exit Interview: Perceptions on Why Black Professionals Leave Grantmaking Institutions.\*](#)

New York: Association of Black Foundation Executives, May 2014.

Most would agree that in recent years, the field of philanthropy has begun to take seriously the need to increase diversity within its sector, and particularly among its leadership. In most major foundations today, it is now commonplace to require diversity of staff and leadership both within their own organizations and externally among their grantees. Yet, emerging data suggest that the experiences of many Black professionals in grantmaking institutions may challenge the current thinking on the field's increasing commitment to diversity. *The Exit Interview* suggests that we have to pay as much attention to the retention of professionals of color as we do to leadership pipelines and development programs for these groups. Strategies change the culture of philanthropy and provide diverse leaders with the "armor" they need to survive in foundation environments.

**Mitchell, Alexandra and Jeffrey Pryor.**

[\*"Help Wanted: Millennials Need Apply."\*](#)

San Francisco, Calif.: The Bridgespan Group, May 20, 2015.

Members of the Millennial Generation have eclipsed Baby Boomers in terms of size and job market saturation. This salient demographic shift is no longer hypothetical. Millennials are quickly becoming an important talent pool for the nonprofit sector. Yet, attracting and retaining young talent today looks different from how it looked during the Boomer generation. Millennials desire greater flexibility, a sense of purpose, and hope for meaningful impact in their work. To secure and retain this talent, the nonprofit sector needs to change how it attracts and develops its employees. This report briefly addresses DEI and anticipates but does not directly link it? to talent-investment or pipelines.

**Mizrahi, Jennifer Laszlo.**

[\*"Celebrating ADA: It's Time to Add a Disability Lens to Our Philanthropy."\*](#)

D5 Coalition, June 18, 2015.

Marking the 25th anniversary of the ADA, the blog post calls for funders to embrace disability mainstreaming, in their grantmaking and in their own operations.

**NYU Wagner, Research Center for Leadership in Action.**

[\*Leadership, Diversity, and Inclusion: Insights from Scholarship.\*](#)

New York: NYU Wagner, Research Center for Leadership in Action, April 2011.

In a report released in partnership with National Urban Fellows, scholars from NYU Wagner's Research Center for Leadership in Action examine recent research on leadership and diversity, with a focus on public service. They find that scholars are linking diversity with adaptability. They also argue that learning how to build organizations that effectively leverage racial diversity can foster the leadership capacity to adapt to other kinds of diversity and thrive in an increasingly complex environment. The report offers implications for leadership at the individual and organizational levels as well as for diversity management programs. It was released in conjunction with the launch of the National Urban Fellows' Public Service Leadership Diversity Initiative, a nationwide campaign to move leaders of color from positions of influence to positions of power in public service.





**Philanthropy Northwest.**

*[Vision and Voice: The Role of Leadership and Dialogue in Advancing Diversity, Equity, and Inclusion.](#)*

Seattle, Wash.: Philanthropy Northwest, April 2014.

From the authors: “Despite a field replete with research, analysis, recommended policies and practices—not to mention an abundance of educational programs and frameworks for grantmaking to diverse communities—philanthropic leaders have been slow to advance these values in their foundations. We wondered: what is getting in the way? Why are good intentions, buttressed with theory and practical advice, not achieving better results on measures of diversity, equity and inclusion? We wanted to explore more deeply. With the support of the D5 Coalition, we began a year-long study to explore these questions. Our study was divided into two parts. We began with personal interviews of 23 philanthropic leaders in the Pacific Northwest. In order to better understand how these organizations incorporated diversity, equity, and inclusion into their work and workplaces, we collected baseline information about their staff composition, leadership styles, and organizational practices/policies. This report details our findings. It includes an in-depth look at the peer cohort model we developed, in which ten foundation leaders met regularly to discuss these issues and support each other in advancing their own leadership. It also includes practical lessons about shifting organizational cultures towards greater diversity, equity and inclusion — lessons drawn directly from the experiences of our peer cohort leaders.”

**Putnam Community Investment Consulting, Inc.**

*[Generating Change: Investing in a New Era of Nonprofit Talent and Leadership.](#)*

New York: Emerging Practitioners in Philanthropy, April 26, 2012.

This paper provides a fresh, solutions-focused framework to help funders address the pressing issue of nonprofit leadership development in ways that are flexible and appropriate across the diversity of the foundation field. It is part of the *Generating Change Nonprofit Talent and Leadership Development Toolkit*.

**Quiroz-Martinez, Julie, Lori Villarosa, and Anne Mackinnon.**

*[Grantmaking with a Racial Equity Lens.](#)*

New York: GrantCraft with the Philanthropic Initiative for Racial Equity, 2007.

A focus on racial equity can increase a foundation’s effectiveness at every stage of the grantmaking process. Blending experience and candid advice from grantmakers, this guide explores how a racial equity lens can help scan the field or the community served, cultivate new leaders, encourage creative approaches, get people talking, and nourish change inside one’s own foundation.

**Reinelt, Claire and Grady McGonagil.**

*[“Leadership Development Investment Framework.”](#)*

Oakland, Calif.: Leadership Learning Community, November 23, 2009.

From the authors: “The Leadership Development Investment Framework is a tool developed to assist funders, program staff, and evaluators clarify the purposes of leadership development and capacity-building supports. The tool was useful in assisting the United Way and other leadership funders in Canada to become more intentional about their investments, where there are gaps, and how they might work together to maximize the impact of their resources.

Since most foundations seek to develop a range of leadership capacities across multiple channels, choosing the right approach and combining the right strategy is a process of experimentation and learning. To make the framework more useful, we have added examples of a variety of programs and illustrated how they invest in leadership development. This framework provides a comprehensive view of 25 potential leadership development opportunities organized in a 5 x 5 matrix. The matrix enables stakeholders to identify patterns in their current investment strategies; engage in deeper dialogue about the purpose of investing in leadership; and become more intentional about the directions in which they want to invest moving forward. New and aspiring funders can adapt strategies and lessons learned from seasoned funders for a successful approach in their own context.”



**Richard, Orlando C.**

*“Racial Diversity, Business Strategy, and Firm Performance: A Resource-Based View.”*  
The Academy of Management Journal, Vol. 43, no. 2  
(April 2000), pp. 164-177.

Although "valuing diversity" has become a watch-word, field research on the impact of a culturally diverse workforce on organizational performance has not been forthcoming. Invoking a resource-based framework in this study, the author examines the relationships among cultural, racial, diversity, business strategy, and firm performance in the banking industry. Racial diversity interacted with business strategy in determining firm performance measured in three different ways: as productivity, return on equity, and market performance. The results demonstrate that cultural diversity does in fact add value and, within the proper context, contributes to a firm's competitive advantage.

**Rockefeller Philanthropy Advisors  
and Council on Foundations, eds.**

*[Diversity & Inclusion: Lessons from the Field.](#)*  
New York: Rockefeller Philanthropy Advisors,  
December 2008.

This publication is the second in a series on diversity and inclusion by Rockefeller Philanthropic Advisors and the Council on Foundations. It features the stories, successes, and experiences of CEOs and trustees of some of the nation's leading foundations and corporate grantmaking programs. Through sharing unique perspectives, struggles and strategies to overcome challenges, they provide insight into how and to what effect diversity and inclusive practices have been embedded within their organizations.

**Rockefeller Philanthropy Advisors  
and Council on Foundations, eds.**

*[Diversity in Action: Strategies with Impact.](#)*  
New York: Rockefeller Philanthropy Advisors,  
July 29, 2009.

Compiles essays by foundation executives and trustees on the impact of diversity and inclusiveness efforts, strategies, and lessons learned. Offers perspectives on community outreach and leadership training, board

development, staffing, and grantmaking. The essay, "A Durable Commitment to Leadership: The San Francisco Foundation," by Sandra R. Hernández and Kurt C. Organista, directly addresses investment in diverse talent and leadership.

**Russell, Elizabeth and Kris Putnam-Walkerly.**

*[Creating New Leaders of Color for the Social Sector: A Case Study of the Annie E. Casey Foundation's Investment in Leadership Management for Tomorrow and New York University's Wagner School of Public Service and Stern School of Business.](#)*

Baltimore, Md.: Annie E. Casey Foundation,  
February 26, 2013.

This case study profiles the Annie E. Casey Foundation's support of efforts to create a broader pipeline of up-and-coming leaders of color for the social sector, in cooperation with Management Leadership for Tomorrow (MLT) and New York University's Wagner School of Public Service and Stern School of Business. The document explores how MLT expanded its successful corporate leadership development model and combined it with the graduate school's joint MBA/MPA dual-degree program to create new opportunities for leaders of color.

**Ryan, William.**

*[Grantmaking with a Gender Lens.](#)*  
New York: GrantCraft, 2004.

In this guide, grantmakers and grantees describe the experience of using a "gender lens" in their work. They explain what gender analysis is and isn't—and why it can help shape more effective programs and organizations. The guide also takes a closer look at how gender analysis has led to new thinking in fields as diverse as public health, international development, juvenile justice, and youth services. And it offers additional insights and special advice on issues ranging from "What about Men and Boys" to "Uncovering Gender Assumptions."

**The Saint Paul Foundation and  
Minnesota Community Foundation.**

*[“Facing Race: A Renewed Commitment to Racial Equity.”](#)*  
St. Paul, Minn.: The Saint Paul Foundation  
and Minnesota Community Foundation,  
October 2013.



This is the racial equity framework adopted in October 2013 by the board and staff of The Saint Paul Foundation and the Minnesota Community Foundation. The framework declares a commitment to racial equity in each of the five identified roles that a community foundation plays in its own community: funders, fundraisers, economic entities, community participants, and employers. The board and staff recognize the importance of their leadership roles in achieving progress toward racial equity; the commitment will be judged in great part by the authenticity of this leadership. The commitment to racial equity will have the desired impact when leadership embraces the racial equity framework, both internally and externally, and welcomes the responsibility and accountability of promoting racial equity as an essential element of its mission.

**The Saint Paul Foundation and Minnesota Community Foundation.**

*[“Racial Equity Hiring Guidelines.”](#)*

St. Paul, Minn.: The Saint Paul Foundation and Minnesota Community Foundation, 2013.

As part of their racial equity framework, The Saint Paul Foundation and Minnesota Community Foundation commit to employing a racially diverse workforce. From the composition of their board to their staff to their grantmaking, the foundations will invest in efforts that attract, retain, and grow racially diverse talent—for their organizations and across Minnesota. A racially diverse workforce prepares the foundations for new and changing cultural contexts. Decisions made in the hiring process will have a long-term impact on the racial and gender composition of the foundations, and they will further the commitment to modeling internal and external leadership in addressing racial disparities. These hiring guidelines inform that commitment.

**Schwartz, Robert, James Weinberg, Dana Hagenbuch, and Allison Scott.**

*[The Voice of Nonprofit Talent: Perceptions of Diversity in the Workplace.](#)*

Boston, Mass.: CommonGood Careers, 2011.

Most nonprofit professionals believe that while the nonprofit sector values racial and ethnic diversity, few organizations are doing enough to attract and retain talent

of color, a report from CommonGood Careers and the Level Playing Field Institute finds. Based on interviews, the report finds that the lack of actionable practices in hiring, professional development, and leadership selection, as well as the absence of diversity among senior management, creates obstacles to recruiting and retaining diverse talent. The report also suggests that while job candidates and current employees evaluate an organization's commitment to diversity by its actual, rather than theoretical, diversity, nonprofits need to break this "negative cycle of inaction" through open dialog, effective communication, partnerships, and networks that facilitate equitable and inclusive hiring practices.

**Smith, Christie and Stephanie Turner.**

*[The Radical Transformation of Diversity and Inclusion: The Millennial Influence.](#)*

Deloitte Development LLC, May 11, 2015.

Millennials are unique in viewing cognitive diversity as essential for an inclusive culture that supports engagement, empowerment, and authenticity—and they're rejecting the current programs and frameworks organizations are using today to foster inclusiveness. Instead, Millennials value inclusion as a critical tool that enables business competitiveness and growth. As Millennials flood leadership ranks, their perspectives will demand a shift in traditional diversity, equity, and inclusion models.

**Stahl, Rusty Morgen.**

*[“Talent Philanthropy: Investing in Nonprofit People to Advance Nonprofit Performance.”](#)*

Foundation Review, Vol. 5, no. 3 (2013), pp. 35-49.

This article argues that people are the primary asset that drives performance in the social sector, but that despite their importance, they are under-supported. Funders could make major strides in their own effectiveness and in the performance of their grantees by explicitly investing in grantee talent and talent-support systems. Such support could build a critical mass of diverse leadership in society and dramatically improve the ability of the social sector to advance social change. The first part of this article reframes the talent challenge facing the nonprofit sector, highlighting urgent issues





and chronic structural flaws. The second part proposes the talent philanthropy framework as a means to address this challenge.

*“Talent Leadership and Development: Recruitment, Retention and Advancement of People of Color in the Nonprofit Sector.”*  
Baltimore, Md.: Annie E. Casey Foundation and Community Wealth Partners, November 10, 2014.

Data-driven presentation on the recruitment, retention, and advancement of people of color in the nonprofit sector. Topics covered include the current representation and future opportunities for people of color in the social sector in various staff and board roles, four points of loss for people of color (attraction and recruitment deficit, hiring gaps, retention barriers, and advancement limitations), and career pathways. Data presented includes educational backgrounds, salaries, and student loan debt. Other information addresses best practices for improving diversity, equity, and inclusion in hiring and fellowship application pools, the self-reinforcing cycle replicating white-majority hiring; candidate assessments of nonprofits’ commitment to diversity, surveys on why people of color leave the sector, and lack of access to mentors and developmental networks.

**Taylor, Dorceta E.**  
*The State of Diversity in Environmental Organizations.*  
[Washington, D.C.]: Green 2.0 Working Group, July 2014.

Environmental institutions have been working on diversity efforts for the better part of five decades. This report discusses the findings of a study of three types of environmental institutions: 191 conservation and preservation organizations, 74 government environmental agencies, and 28 environmental grantmaking foundations. It also reports the findings of interviews conducted with 21 environmental professionals who were asked to reflect on the state of diversity in environmental institutions. The study focuses primarily on gender, racial, and class diversity in these institutions as it pertains to the demographic characteristics of their boards and staff. It examines the recruitment and hiring of new workers as well as the types of diversity initiatives undertaken by the organizations. The report

also discusses other kinds of diversities such as cultural, sexual orientation, inter-generational, and rural-urban.

**Third Sector New England.**  
*“Step-by-Step: A Guide to Achieving Diversity and Inclusion in the Workplace.”*  
Boston, Mass.: Third Sector New England, 2010.

In this guide for nonprofit organizations, the authors provide a step-by-step approach, in seven phases, to achieving diversity and inclusiveness in the nonprofit workplace. While they advise readers to make it clear to their coworkers and their board that this work is ongoing, they offer practical advice for creating a better work environment and a more productive organization better able to face the challenges presented in the 21st century.

**Villarosa, Lori and Maggie Potapchuk, eds.**  
*Critical Issues Forum: Moving Forward on Racial Justice Philanthropy, Vol. 5.*  
Washington, D.C.:  
Philanthropic Initiative for Racial Equity, 2014.

From the authors: “*Moving Forward on Racial Justice Philanthropy* is the fifth volume of Critical Issues Forum series, which aims to deepen the discourse around important progressive racial justice issues within philanthropy. As PRE celebrated our 10th anniversary last year and engaged allies within the nonprofit and philanthropic sectors to mark the occasion with us, we heard “Have you seen any progress?” repeatedly and knew it was important to take stock of what many of us have been collectively aiming to move for decades. Through focus groups, webinars and direct interviews, our team has sought to get a strong sense of both funders’ and activists’ perspectives on progress particularly over the past two decades. We are pleased that through funder case studies and activist essays about structural racism analysis, intersectionality and media justice, we’re able to share real progress, even as each piece recognizes there is still much more to be done.”

**Vincent, Peter and Monisha Kapila.**  
*“Five Ways to Build and Maintain Staff Diversity.”*  
San Francisco, Calif.: The Bridgespan Group, February 23, 2015.



Blog post discussing 2013 American Express NGen Fellows' project researching the National Audubon Society's difficulty attracting, retaining, and advancing leadership of color, and making recommendations to address that challenge.

**Virgil, Julayne Austin, Molly Brennan, and Allison Wyatt.**

[\*From Intention to Action: Building Diverse, Inclusive Teams in Education to Deepen Impact.\*](#)

Newburyport, Mass. and Oakland, Calif.:

Koya Leadership Partners and Education Pioneers, 2014.

*From Intention to Action: Building Diverse, Inclusive Teams in Education to Deepen Impact* provides a roadmap with specific practices and recommendations for education organizations to build and sustain more racially diverse teams:

Tackling the challenges of building diverse teams takes dedication, commitment, and perseverance. This report guides education organizations and others to move beyond discussion and intention and take meaningful action.

**Walker, Vernetta L. and Deborah J. Davidson.**

[\*Vital Voices: Lessons Learned from Board Members of Color.\*](#)

Washington, D.C.: BoardSource, December 26, 2011.

For several years, BoardSource has collected demographic information regarding the racial and ethnic composition of nonprofit boards as part of its Governance Index survey. That research informs that the composition of boards has changed only slightly in the past 17 years, despite rapidly changing demographics in the U.S. population. While more than 86% of board members of color surveyed in *Vital Voices: Lessons Learned from Board Members of Color* said they either almost always or often feel comfortable voicing their opinions at meetings, 13% said they have encountered some form of tokenism. *Vital Voices* is BoardSource's first survey designed to amplify the voices of people of color serving on nonprofit boards of directors.

**Wolcheck, David, Lisa Jackson, and Lawrence T. McGill.**

[\*Diversity Metrics Forum: Developing Standards for the Collection of Data on Diversity in Philanthropy.\*](#)

New York: Foundation Center, September 1, 2010.

In recent years, private foundation leaders have found themselves in the national spotlight due to growing public concern about the lack of available data on the diversity of foundation staff and boards, as well as grantee organizations and the communities they serve with the support of philanthropic dollars. This report summarizes the discussions that took place at the Diversity Metrics Forum, which brought together 47 foundation leaders, researchers, and representatives of philanthropic infrastructure organizations to discuss strategies for systematically collecting data on diversity in philanthropy.

**Wolfred, Tim.**

[\*Building Leaderful Organizations: Succession Planning for Nonprofits. Vol. 6 of Executive Transitions Monograph Series.\*](#)

Baltimore, Md.: Annie E. Casey Foundation, 2008.

This paper has two primary goals. First, it seeks to continue detoxifying the topic of nonprofit succession planning so that executives, boards, staff, and funders can take up these activities without unnecessary fear or concern. Second, it hopes to provide nonprofit boards and executive directors with a framework for their own succession planning activities. This publication presents alternative models of succession planning designed particularly for nonprofits. The ends in mind:

- Pursuing the agency's mission and service goals as effectively as possible
- Ensuring agency stability by developing bench strength behind its executive and key managers
- Creating the possibility that successors for the agency's executive director and top managers will emerge from its talent pool

**Wolfred, Tim.**

*Interim Executive Directors: The Power in the Middle. Vol. 2 of Executive Transitions Monograph Series.*

Baltimore, Md.: Annie E. Casey Foundation, 2005.

This paper explores the benefits and basics of using an interim executive director during a leadership transition. It also highlights some considerations that organizations should take into account when deciding whether or not to use an interim executive director.

**Yoshino, Kenji and Christie Smith.**

*Uncovering Talent: A New Model of Inclusion.*

Deloitte Development LLC, December 6, 2013.

It has now been many years since the diversity and inclusion revolution swept the corporate world. Today, most Fortune 500 companies have a diversity and inclusion officer who superintends an impressive array of programs focused on the needs of a diverse workforce. Yet reports suggest that full inclusion remains elusive. Why have inclusion programs stalled? One intuitive answer is that these initiatives have not lived up to the core ideal of inclusion. The ideal of inclusion has long been to allow individuals to bring their authentic selves to work. However, most inclusion efforts have not explicitly and rigorously addressed the pressure to conform that prevents individuals from realizing that ideal. This study hypothesizes that a model of inclusion analyzing that pressure might be beneficial to historically underrepresented groups. Indeed, given that everyone has an authentic self, a culture of greater authenticity might benefit all individuals, including the straight white men who have traditionally been left out of the inclusion paradigm. To test this theory, this research draws on the concept of "covering."

*This annotated bibliography was completed in October 2015 and was prepared by Ian Lekus, Ph.d. who served as a research analyst for Fund the People.*



## About Fund the People



Fund the People is the national campaign to maximize investment in the nonprofit workforce. To achieve this goal, we make the case, equip for action, and build a movement to change the attitudes and behaviors of funders, fundraising nonprofits, and the intermediaries that support them. There is a long-standing, sector-wide deficit of investment in the nonprofit workforce. Nonprofit professionals work in environments typified by high burnout and stretched resources. So there is a real demand for equitable salaries and benefits, more and better professional development, improved

human resources functions, and healthy organizational culture. Together, we can address these challenges by reshaping existing resources to prioritize nonprofit people as the central asset of nonprofit performance. Now more than ever, we can ensure that America's civic leadership is diverse, well-supported, high-performing, and sustainable for the long haul. Launched in 2014 and headquartered in Beacon, NY, Fund the People (originally known as Talent Philanthropy Project) is a project of Community Partners. Our work is informed by an Advisory Council of diverse leaders and a team of skilled staff and consultants, and is supported by a coalition of regional and national foundations.

**To learn more about Fund the People visit:**  
[fundthepeople.org](http://fundthepeople.org)

## Acknowledgments

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A Washington, D.C.-based consultant, possesses more than two decades of experience working at the intersections of research & analysis, program management, needs assessment, strategic planning, and evaluation. Dr. Lekus is passionate about building the capacity of the social sector to promote community empowerment and social inclusion. He served as Research Analyst and Operations Manager for Fund the People and as Philanthropy Research Fellow for Quality Enhancement for Nonprofit Organizations at the University of North Carolina Wilmington. With degrees from Duke and Cornell, Dr. Lekus has taught U.S. & international politics, protest movements and community organizing, and LGBTQ studies at Harvard, Tufts, the University of Georgia. Dr. Lekus can be reached at [ianlekus@gmail.com](mailto:ianlekus@gmail.com).

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