



insights

Bridge Partners LLC
11 East 44th Street
Suite 1001
New York, NY 10017
Tel: 212-265-2100
Fax: 212-685-3010
www.bridgepartnersllc.com

MAY 2013

A PUBLICATION BY BRIDGE PARTNERS, LLC

diversity-inclusion IN THE PHILANTHROPY AND NONPROFIT SECTORS

CONTENTS

- Q&A: Ericka Plater-Turner,
Council on Foundations 3
- Q&A: Amanda Fernandez,
Teach For America 5
- Q&A: Valerie Kennerson,
American Cancer Society 6

CONTACT

- Janet Albert — Partner
- Tory Clarke — Partner
- Larry Griffin — Partner

EDITOR'S NOTE: We typically try to avoid producing an issue of Insights that focuses on recruitment - we prefer to address broader diversity and human capital issues that can help our readers map and understand the diversity-inclusion landscape. However, when considering today's key discussions around diversity in the nonprofit and philanthropic sectors, the topic of recruitment is unavoidable. The recruitment and retention of senior-level diverse executives for the nonprofit and philanthropic sectors is a critical issue, so we thought we'd tackle it head-on, offering first the case for diversity, then some insights from sector practitioners.



During our discussions with US nonprofit leadership executives, staff, board members and funders, the one message that came through loud and clear is something that we have also watched evolve in the for-profit sector, over the decade that we have been in business: diversity-inclusion needs to be more than an organizational value. There needs to be an actionable plan that is measured and linked to the business case or, in this case, mission.

The Case For Diversity

US Demographics: The US Census Bureau estimates enormous changes in the size and make-up of the US demographic by 2050. The population will get older – 13% are now at least

65 years old, this will grow to 20% by 2050. At the same time, America's relatively high fertility rate means that the population of young people will also continue to increase. The third key component is immigration, with estimates that 1 million people a year will come to the US from other nations.

Most of this net population growth in the US will be among minorities, for example Latino and Asian populations are expected to nearly triple, and 40% of children under 5 years old will be Hispanic.¹ By 2050 we will have a minority-majority population. Nonprofit and philanthropic organizations will need to adjust to this new reality of increased age, racial and ethnic diversity in terms of changing assets and challenges in the communities served, services offered, cultural competencies etc.

(continued on page 2)



Giving & Serving Internationally: A 2005 survey² suggested that, as a result of the changing demographic, more money will flow from the US to communities and initiatives overseas. At that time, the pool of funds being “sent home” by foreign-born individuals living in the US was estimated at somewhere between \$50bn and \$75bn per year, across all income categories. A recent discussion at the Global Philanthropy Forum suggested that global remittances have increased exponentially: up from \$132 billion in 2000 to an estimated \$406 billion in 2012. Those statistics dramatically change the pre-conceived notion of “who is a donor” in the US and

provide enormous opportunity for established and new internationally-focused nonprofits/philanthropies to grow, change and leverage technology/social/human capital to aggregate gifts, leverage impact and study newly-emerging needs.

Social Influences: Changing attitudes, behaviors and legislation around topics such as acceptance of LGBT lifestyle, and more complex

faith-based giving, mean that the landscape for nonprofits and philanthropies will continue to change in terms of both constituents served and funding opportunities. Additionally, while some of the social issues that were considered challenging to raise funds for in previous decades are now widely accepted, they are being replaced by new missions such as combatting cyber-bullying and spiritual approaches to traditionally medical challenges.

Fundraising & Donors: The changing demographic across the nation will likely create potential for an increase in diverse donors, including donors of color, women, LGBT donors, rural populations, and youth. There will likely be an increase in community-based donor pools, driven by heritage giving-traditions, possibly leading to a more fragmented community giving strategy, more identity-based funds, and the rise of new approaches to giving.

There will also inevitably be an increase in the number of high-wealth donors of color, or those who self-define in others areas of diversity, who the philanthropic community will need to identify, reach and build purposeful relationships with. These donors may have a different focus or agenda and be keen to create identity-based funds or other solutions in their own communities.

Volunteers: The impact of demographic change on the population of potential volunteers is also significant,

particularly in relation to race/ethnicity and age. Effective nonprofits will need to adjust their approach to recruiting, communicating with, and inspiring volunteers with different time commitments, skills, and levels/methods of engagement.

Philanthropic Leadership In This Context

Where to start? There is a clear case for diversity of leadership teams at every turn. Senior leaders will need to build relationships with new donor populations and adjust to new priorities of the existing donor pool; be more visible in diverse communities; develop relationships with/understand the needs of a population that is both aging and more youthful; provide direct insight and cultural competency among communities served and issues addressed; build relationships with different volunteer profiles; have experience living or working internationally; bring a diversity of thought and approach, drive increased innovation....the list goes on.....

In a nutshell, donors, constituents served, volunteers and staff will expect to see themselves in the leadership of the institutions to whom they give their money, time, career or loyalty. As a result, nonprofits and philanthropies face the need to ensure diversity of all types in leadership roles and to modify the composition of their boards.

How to Deliver Diversity-Inclusion At Senior Levels

Of course, this is where we could simply say: “Use a great search firm!” However, that is just one part of the solution. There is work to be done both before and after embarking on the recruitment process. We come back to the decisive action plan, ensuring that there is an inclusive culture and clearly understood business case for a diversity-inclusion initiative in order to both attract and retain high-performing executives of all types, at all levels.

It is important to look at the recruitment process itself and the commitment of those in decision-making positions. Whether using a search firm or undertaking an internal recruiting process, the major factors influencing the current lack of diversity in the nonprofit sector are: who is approached, how they are approached and why they are being approached.

“You want diversity on your board because you want your board disrupted....but you also want boards with a cohesive atmosphere....As ever, striking that balance is easier said than done.”³

‘Benchmarking in Association Management Governance Policies & Procedures’ - Survey ASAE 2012

- 7% no female board members
- 39% no board members of ethnic or other minority groups
- 77% no board members under age 30
- 19% of associations have a written diversity policy for board members

(continued on page 3)

q&a

ERICKA PLATER-TURNER, CAE

MANAGING DIRECTOR OF PROFESSIONAL DEVELOPMENT, D&I, RESEARCH & EVALUATION
COUNCIL ON FOUNDATIONS

As we continually espouse to our clients, if you want high quality diverse executives for your team, you have to go out and proactively identify and recruit them. Don't go to your current network for the x-th time and hope to come up with a different result, think about it differently and reach out to new networks.

But that isn't the end...potential employees rely on their perceptions of workplace culture and environment to guide their first impressions of the organization as a potential employer. If you are looking to recruit a diverse team then you need to strive to develop a diverse culture. Again, this is more than a stated value on the website,

it will be assessed at every point of the recruitment process including the first approach or job-posting, the job description, each stage of the interview process and the on-boarding strategy.

Be clear on why you are looking to build a more diverse team. Potential employees do not want to be hired on the basis of "tokenism".⁴ In the interview process, focus on how diversity-inclusion might be broadly leveraged and how diverse backgrounds, experiences and viewpoints can aid the mission and communication efforts and can add-value to the organization as a whole, not being simply viewed in a silo.

"The organizational missions of nonprofits are usually challenging enough. When such organizations cannot attract and retain people of color, especially those whose experiences help them relate to the target population of the nonprofit, attainment of the mission becomes that much more difficult."⁵

Finally, take care to ensure your culture and approach supports the retention of your new talent. According to one survey (Commongood Careers & Level Playing Field Institute) 27% of those surveyed reported that they left a job due to lack of diversity and inclusiveness, of those, 64% identified as people of color. A diverse leadership team ought to actively support the development of an inclusive culture and help to retain and develop a more diverse employee-base.

¹ "The Changing Demographics of America", Smithsonian Magazine – July/August 2010

² "Donors of the Future" – 2005 Report commissioned by New Ventures in Philanthropy, the Forum of Regional Associations of Grantmakers, and the Council on Foundations Community Foundation Leadership Team

³ "Associations Now Associations Board Challenge", blog post - January 2013, Mark Athitakis

⁴ "Is the Nonprofit sector Doing Enough For Diversity?", Diversity Journal – November 2012, Julie Hayes

⁵ "Nonprofits Can do More to Promote Diversity", Huffington Post – April 2011, Robert Schwartz, Executive Director Level Playing Field Institute



Ericka is a career association professional with over 13 years' experience in association management leading staff and volunteers by creating, managing, and building effective programs geared towards leadership and professional development.

As Managing Director of Professional Development, Diversity & Inclusion and Research & Evaluation at the Council on Foundations, Ericka oversees the Professional Development department programming, operations, and staff focusing on executive level education, leadership development and the fundamentals of philanthropy. In addition, she oversees the Council's work in the area of diversity and inclusion and research and evaluation. Prior to this position, she was Director of Education at the Heart Rhythm Society, and Assistant Director of Resource & Program Development at the American Association of School Administrators.

The Council on Foundations has a comprehensive plan to embed and institutionalize diversity within your organization and asks member organizations to make the same commitment with regard to grantmaking, staffing, governance, business practices and organizational climate. Is progress being made among members and are certain initiatives "quicker wins" than others?

There is a growing awareness in the philanthropic field of the value that a diversity and inclusion lens brings to a foundation and its grantmaking. As part of the Council's



commitment to diversity and inclusion—which includes dedicated, programs, resources, and initiatives—the organization has an open and inclusive call for board nominations and a demographic data collection process with questions about diversity to ensure a broad representation on the board, committees, and staff. We encourage dialogue among members and other philanthropic entities on this topic and have seen a growing number of regional associations of grantmakers working to establish stronger links with diverse communities; more infrastructure organizations, affinity groups, and support organizations are also developing strategic partnerships to develop and share programs and practices that support diversity and inclusion.

While many foundations of different types and sizes have an increasingly diverse staff, there remains a broad lack of diversity at the leadership and board level. What are the key initiatives that you have seen as being successful in changing this?

There are a number of entities and initiatives in the philanthropic sector focused on increasing diversity in philanthropy, whether at the leadership levels of foundations or in grantmaking and business practices. Here are a few examples, but many more exist in philanthropy:

- The Council's Career Pathways program aims to address diversity at the leadership level in philanthropy. The Pathways program prepares senior level professionals from diverse backgrounds to compete for executive level positions within philanthropy. The program is intentional about connecting participants to the search community, as well as building their networks by connecting them to leaders in the field. Since the program's inception three years ago, there have been 37 graduates. Eleven were promoted, four are currently CEOs or presidents of philanthropic and nonprofit organizations, and 15 serve in a volunteer capacity on Council committees.

- The Council also promotes conversations on diversity and inclusion through CEO retreats, conferences, and tools for the field. We firmly believe that the work of increasing diversity at the highest ranks in philanthropy has to happen on both the supply and the demand side.

- The D5 Coalition is committed to creating more inclusive CEO and trustee leadership through peer-to-peer dialogue and relationship building with diverse communities. D5 publishes an annual State of the Work report that highlights the work of strategic partners taking a leadership stance on diversity as well as asking hard questions about what still needs to be done in the area of diversity and inclusion.

- Foundation Diversity Policies and Practices Toolkit, published by The California Endowment, offer examples of policy statements and procedures that incorporate diversity into both grantmaking and organizational practices. It also offers a collection of best practices in the philanthropic field and provides a set of examples and for those considering embedding the language of diversity and inclusion at the institutional level.

- The Michigan Council on Foundations launched a six-year initiative in 2008, Transforming MI Philanthropy Through Diversity and Inclusion, aimed at increasing the effectiveness of organized philanthropy in Michigan through diverse and inclusive membership, increasing members' voluntary actions to become more diverse and inclusive, and increasing the diversity of individuals serving, leading, governing, and advising foundations and corporate giving programs.

In what ways does a more diverse philanthropic leadership better serve an increasingly diverse community?

Philanthropy has debated the rationale for more diverse leadership, staffing, and grantmaking for years. With the rapidly changing demographics of our nation as well as the call for greater accountability, transparency, and effective leadership, many in philanthropy recognize the connection between understanding and embracing unique perspectives of communities in need and the leadership of the organizations that serve them. There is a growing awareness that leadership that more accurately reflects the community it serves may garner points of view, experiences, thinking, and ultimately strategies that more readily apply to the broad needs facing diverse communities.



As Vice President of Latino Community Partnerships, Amanda Fernandez is responsible for leading Teach For America's Latino Initiatives that support both outreach to the Latino community as well as recruitment, advancement and development of Latino

corps members and staff.

Prior to joining Teach For America, Amanda was a director at The Bridgespan Group where she served as an organizational consultant to youth and education clients in support of their strategic planning efforts. Previously, Amanda was the Director of Organization Development for Hudson, a global staffing and human capital firm, where she launched a diversity consulting services unit within the organization. In addition, she was a Director at Sodexo where she led diversity efforts for their largest division. She also has worked in various consulting capacities at Deloitte.

She is a blogger on Huffington Post Latino Voices where she promotes the importance of building Latino Leaders in our nation, and is on the national advisory board of New Futuro and on the local board of Oiste.

How does the changing demographic in the US, which will lead to a minority-majority population in the relatively near future, continue to influence your work at TFA?

As an organization committed to ensuring all children—no matter their zip code or skin color—have access to an excellent education, we're urgently focused on our work with Latino students and communities. Right now, 1 in 4 school age children is Latino and Latinos have the highest poverty rates in the country. We are placing particular focus on growing the force of talented Latino teachers and education leaders and building robust partnerships with Hispanic focused organizations including the Congressional Hispanic Caucus Institute, New Futuro, Hispanic Scholarship Fund and the Hispanic Heritage Foundation. As the number of Latino youth continues to rise, this work is only growing more critical and it will take all of working together to ensure we're providing the next generation of Latino children with the opportunities they deserve.

"Growing in Scale & Diversity" is the first point on TFA's formal growth plan. Do you have a focus on driving diversity into the national leadership, as well as the teaching corps?

We spend a lot of time thinking about the diversity of our corps and staff because our kids cannot be what they cannot see. We believe that talented teachers who share the backgrounds of our students can have a profound additional impact as role models and education leaders who share the background of the communities where we work can play a critical role in the long-term push for educational equity. We have seen exciting growth in the number of diverse individuals entering our organization's work over time. Last year, 38% percent of our corps and 39% of our staff new hires identified as people of color. Our executive leadership team is also increasingly diverse and we recently announced Elisa Villanueva Beard, a Latina, as our new co-CEO. With that said, we know there is still so much to be done and we're continuing to work hard to increase both our overall diversity as well as the number of Latinos in our corps and on our staff.

Does the diversity of your Board help to drive diversity-inclusion initiatives for TFA?

We have a diversity committee on our National Board that advises on our diversity work across the organization. A diverse National Board has been absolutely critical to bringing additional perspectives, pushing our thinking, and helping us continually move forward toward our aspiration of being a model of fairness and equality for our nation.

Are your major funders influential in driving diversity initiatives?

There are several funders that have been critical supporters of our diversity work and understand the important role diverse talent plays in ensuring we're expanding educational opportunity for all children. We are fortunate that these partners deeply understand the long-term economic, civic and moral implications for our country if we don't provide our kids growing up in poverty—who are disproportionately children of color—with the educational opportunities they deserve.

VALERIE KENNERSON
VICE PRESIDENT TALENT ATTRACTION
AMERICAN CANCER SOCIETY



In her role as VP Talent Attraction with the American Cancer Society, Valerie is responsible for the acquisition strategy for recruiting staff as well as volunteers to support the mission of the American Cancer Society. The scope of the role includes strategy, process, tools and technology as well as employment branding.

Prior to joining the American Cancer Society in June 2007; Valerie held the position of Director of Strategic Sourcing and Selection for The Coca-Cola Company. As a member of the Leadership of the Global Talent Management Team at Coca-Cola she was responsible for the practices associated with acquiring talent across the global organization.

Valerie joined The Coca-Cola Company from Corning Incorporated, where she was Director of the Global Recruiting Center of Excellence, instrumental in the transformation of Corning's staffing function to a Center of Excellence. Prior to this role she served as Corning's Global Marketing Manager and College Relations Manager, and prior to joining Corning, was Manager, Strategic Sourcing for Lucent Technologies in Warren, NJ.

Valerie began her career in recruiting with Management Recruiters International, successfully managing a telecommunications recruiting desk. In the course of her career she has worked in Japan, China and Taiwan as well as the US.

Is there a clearly-stated and understood business case for diversity for American Cancer Society? Does that translate clearly to the need for diversity to be ingrained in talent acquisition initiatives?

Yes, the impact of race/ethnicity and socioeconomic position on risk for cancer, access to care and education is well documented and clear. In turn we must ensure that our staff and volunteer diversity is an enabler to help in our mission in these areas.

Do you feel that your organization views their diversity recruiting initiatives as successful? Is it more successful at certain levels of the organization than others?

At The American Cancer Society we strive to ensure that we identify a diverse slate of candidates for each of our openings. The majority of our Leadership roles are filled from within so we also focus on succession planning and diversity within that practice. We can always do better and evaluate on an ongoing basis our sourcing strategy and results as well as ensuring that we understand the objectives of our organization and how those translate to Staff and Volunteer recruitment needs.



High caliber executives will always be in high demand - how does your organization compete for high caliber minority executives?

This is a challenge for us especially being in the non-profit sector where we cannot always compete in terms of compensation packages and the like. We focus on "fit" finding a high caliber professional with an affinity to our mission.

COUNCIL ON FOUNDATIONS

TEN WAYS TO BECOME MORE DIVERSE, INCLUSIVE, AND EFFECTIVE

Begin by examining the following through a lens of achieving greater inclusiveness and diversity:

1. Start with your organizational mission.

Is it well understood? Are the values expressed in your mission shared and embraced throughout the organization?

2. What are your goals and purpose of your grantmaking?

Are your grantmaking practices inclusive of the individuals your grantmaking will impact? Are the resources in place in order to achieve your grantmaking goals?

3. How would you assess your organization's climate and culture?

4. How do grantees (both declined and awarded), staff, board, volunteers and stakeholders perceive your organization's climate and culture?

5. If permissible by your board charter, have you considered your board appointment process?

Does your Board reflect the community you are serving?

6. How is diversity in staffing considered?

If you employ individuals from diverse backgrounds, are they included in decision making? How are individuals from within your organizational learning from their backgrounds and experiences?

7. Have you considered diversifying your business contracting and vendor process?

8. Does your foundation collect demographic data on grantees and applicants?

How diverse is your grantmaking? Are there disparities between declined applicants and awarded applicants?

9. How diverse are your advisory committees?

Is their demographic composition reflective of the communities you serve?

10. Have you considered the convening and education role foundations can have with the nonprofit community—especially among grassroots nonprofits serving diverse communities?

Reproduced with kind permission from the Council on Foundations

www.cof.org/programsandservices/diversity/index.cfm

spotlight on our nonprofit practice

JANET ALBERT, PARTNER & NONPROFIT PRACTICE LEADER



A Partner of Bridge Partners LLC, Janet leads our nonprofit practice and works on senior-level search assignments for foundation, government and nonprofit organizations, across all functions. Clients range from private and family foundations, to both large national and local nonprofits. Reflecting our corporate diversity mission and focus, many of our nonprofit clients serve disadvantaged populations or disinvested communities.

Before joining Bridge Partners LLC, in 2010, Janet was a Senior Director in the executive search practice of The Bridgespan Group, a nonprofit consulting firm that helps nonprofit leaders to develop strategies and build organizations that inspire and accelerate social change.

Earlier in her career, Janet was a consultant with the executive search firm Whitehead Mann, working across a variety of sectors with a particular focus on due diligence projects for private equity clients and their portfolio companies. She started her career in executive search working for a privately held firm in the UK, where she spent seven years as a generalist recruiter.



SELECT NONPROFIT CLIENT LIST

America Scores
Boys & Girls Club of Newark
Benwood Foundation
Connecticut Council for
Education Reform
City Harvest
Cleveland Foundation
Communities in Schools
Consumer Finance
Protection Bureau
David and Lura Lovell
Foundation
Gender Policy Advocacy
Coalition
Jackie Robinson Foundation
Pipeline Crisis
Robert Wood Johnson
University Hospital
Foundation
Robins Foundation
Starbucks Foundation
Streetwise Partners
TIAA-CREF
Turnaround For Children
University of Medicine &
Dentistry of NJ
Woods Hole Oceanographic
Institute



Bridge Partners LLC Executive Search Consultants

11 East 44th St, Suite 1001
New York, NY 10017
Tel: 212-265-2100
Fax: 212-685-3010
www.bridgepartnersllc.com

SELECT FOR PROFIT CLIENT LIST

Alcatel-Lucent
American Eagle Outfitters
Barnes & Noble
Brown Shoe Company
Burlington Coat Factory
Campbell Soup Company
Choice Hotels
Colgate-Palmolive Company
CVS Caremark
Federal Reserve System
FHL Bank Pittsburgh
Foot Locker
Fossil
General Electric Company
GNC Corporation
Grant Thornton International

Kaiser Permanente
Macys
Medco Health Solutions
Microsoft
Novartis Pharmaceuticals
Pfizer (Wyeth Pharmaceuticals)
Prudential Financial
Sodexo
Starbucks
Starwood Hotels & Resorts Worldwide
Sullivan & Cromwell
TJX Companies
Tommy Hilfiger
Travelers
USAA
Walt Disney Company
Wendy's International

ABOUT BRIDGE PARTNERS LLC

Bridge Partners LLC is a retained executive search firm with an unrivaled ability to successfully and efficiently execute senior-level search assignments, bringing to each project a focus on ensuring that our clients are presented with a diverse slate of candidates.

Our reputation has been built on consistently achieving superior results in the execution of our assignments. We are dedicated to a client-driven process and believe that process is maximized by partnering with the client organization on a relationship-driven, long-term basis. Bridge Partners LLC maintains the highest level of ethical standards and integrity with both clients and candidates by placing their interests first and ensuring that our methodology and process is transparent during the entire search process.

DIVERSITY-INCLUSION

We know diversity is a business imperative. As a minority-owned business, it is an intrinsic component of what we do. It is a core value of Bridge Partners LLC and is embedded in every aspect of our culture and practice.

We provide a higher level of service and raise the degree of expectation regarding inclusion in our candidate slates. We recognize that ability is the top priority, regardless of race, gender or any other defining characteristics and our track record of successfully attracting and placing senior level diversity candidates proves our ability and commitment to building our clients' management strength and social responsibility.

All Editorial Content is written by employees of Bridge Partners LLC, unless stated otherwise. It is the property of Bridge Partners LLC and is protected by United States and international copyright laws.