

HELPING DONORS MAKE A DIFFERENCE.



Memorandum

To: LBE Network Members

From: James A. Marks, Vice-President
Greater Milwaukee Foundation

Date: March 25, 2004

Subject: Leading By Example Tool Kit

We are please to share some of the materials that emerged from our LBE efforts with others in the community foundation sector that are working on diversity, inclusion, and equity. The “working resources” we have made available for the LBE Tool Kit are as follows:

1. An early stage work plan that outlines the overall structure and approach for the Foundation’s LBE Diversity, Inclusion, and Equity activities (developed in 2002 at the beginning of the LBE Initiative).
2. Nondiscrimination Policy Approved September 2003 by the Foundation’s Board of Directors. (Note this is different from a “Value or Mission Statement”. It is a policy that is applicable to grantmaking, hiring, contracting opportunities, and other related areas for conducting the Foundation’s day-to-day business activities.)
3. President’s Report on 2003 LBE activities, dated December 2003.
4. New Hiring Process formally approved March 2004.
5. Excerpts from our Diversity Vendor Directory.
6. “Creating Inclusive Leaders Course Objective & Agenda” from a training curriculum designed for the Foundation to improve its organizational effectiveness and community relevance, and improve staff’s awareness of racial issues relating to Diversity, Equity, and Inclusion. This training curriculum was coordinated by the YWCA of Greater Milwaukee and featured Inreach Consulting as the trainer/facilitator.
7. A Foundation commissioned a study, Realities, Challenges and Possibilities: Poverty in Greater Milwaukee, May 2003. The report was commissioned to assist the Foundation: a) have a better understanding of the nature and extent of poverty, b) provide information about the public resources available to help low-income families become self-sufficient and how these resources are being used, and c) capture the

demographic changes that have occurred between 1980 and 2000. A copy of the report can be obtained by using the Foundation's website:

www.greatermilwaukeefoundation.org. The link is located at the bottom of our Home Page, titled "Tax Preparation Super Site Valuation and Poverty Study." (Click this heading, which will take you to the study page, then click Poverty in Milwaukee to view and or print a PDF copy)

The Foundation is pleased to provide these "hands on" resources in the hope that others in philanthropy will find them useful as they too embark on this journey toward economic inclusion of isolated populations in the United States of America.