

Greater Milwaukee Foundation
Leading by Example

The impetus to join the Leading by Example project came from the Foundation's President and senior staff starting in 2001. The Foundation has long had some diversity on both its Board and program staff. It was also instrumental in starting the Women's Fund and the Wisconsin AIDS Fund. The Foundation also has a small but growing number of donors of color.

Nevertheless, there is a strong sense that much remains to be done. In 2002 African-Americans, Hispanics and Asians collectively constituted a majority of Milwaukee's population for the first time. In spite of this there is growing racial divide. Even with the growing diversity within the metropolitan area, it remains one of the most racially segregated communities in the nation.

It was recognized by staff that for the community foundation to be successful in carrying out its mission, it must better reflect the diversity of the community both internally (staffing, Board composition, vendor selection) and externally (grant-making, cultivation of prospective donors, convening and leadership roles).

There was agreement by staff that before the Foundation could, with any credibility, address the external issues of diversity it would first have to demonstrate its own internal commitment to diversity in its board and staff composition, its adoption and adherence to policies that promote diversity, its selection of vendors of color, and the like. We knew we could not, for example, question the staff or Board composition of our grantees unless our own Board and staff better reflected the diversity of our community. In short, we needed to "lead by our example."

Since the Greater Milwaukee Foundation joined the Leading by Example project a year ago, we have achieved the following results:

- In 2003 we filled three of seven vacant positions with staff of color including our Director of Communications and a Program Officer position.
- Modified the Foundation's hiring process to require that we proactively seek candidates of color for every vacant position.
- Increased the Board's diversity. By mid 2004 there will be three instead of two persons of color on the twelve-member Board.
- Received Board approval to recruit non-Board members of color for key Board committees including the Development, the Communications and the Program Committee.
- Held a full-day staff retreat on the topic of diversity. In 2004 we will hold additional staff retreats on this same topic.

- Involved all staff in cross-department work groups to recommend specific actions that can be taken to better reflect the diversity of the community in all of the Foundation's efforts.
- Held voluntary informational sessions on diversity, equity and inclusion for all staff and encouraged staff to participate in informational meetings conducted by community organizations.
- Received Board approval for a new anti-discrimination policy and the requirement that all grant applicants report whether they have a similar policy approved by their Boards.
- Modified the grant application process to gather data on the board and staff diversity of all grant applicants.
- Assembled a directory of minority vendors.
- Co-funded the Hispanics in Philanthropy program over a three-year period. Our Senior Program Officer actively participates on the oversight board for this effort.
- Established the LGBT (Lesbian, Gay, Bisexual, Transsexual) Fund and are supporting the fund-raising efforts to build the Fund. The Foundation has made a grant of \$50,000 to the Fund. The local LGBT community foundation with whom we are partnering on this effort is considering a Fund within the Foundation.
- Provided a three-year grant to support the efforts of the Women's Fund of the Greater Milwaukee Foundation to double its endowment.
- Provided a grant to the University of Wisconsin-Milwaukee to prepare a report on the growth of poverty in the past thirty years. Race and poverty are closely related in our community and yet this issue is rarely discussed.
- The study also focused on the utilization rates for existing programs such as the Earned Income Tax Credit, food stamps, Badger Care, and day care. Based upon the results of the study, the Foundation helped develop two volunteer income tax preparation sites that dramatically increased the utilization of the Earned Income Tax Credit.
- With the assistance of a Board member and former Board member are planning a reception for prospective donors of color.

Based upon our participation in the LBE program, there were a number of lessons learned including the following:

Understand your Commitment: The commitment to reflect diversity in all of the Foundation's efforts must start with the President/CEO. Rarely do donors, grantees or Board members urge the Foundation to engage in this effort. Thus, it is important that the CEO understand his or her commitment to diversity and be willing to "stay the course" when there is little visible support for doing so.

Measure Results: Gather baseline data on the Foundation's efforts to reflect the diversity of the community in its governance, staffing, vendor selection, investment management, grant-making and asset development.

Involve all Staff: We chose to organize the staff into work groups around some key topics – governance, grant making, vendor selection, development, and the like. All staff was required to participate in at least one work group and we consciously required staff from each department to be represented on each work group. It was equally important to involve all staff in one or more retreats that focused on the issue of diversity.

Develop Goals: With the feedback from the work groups and department heads, develop some achievable annual goals. Include these goals in the annual work plans for each department and hold department heads accountable for achieving the goals.

Find a Board Champion(s): To lead by example on the issue of diversity, the Foundation's Board must be seen as a diverse board. To engage the Board on this issue required a Board champion – in our case a former African-American Board member who was willing to attend the LBE sessions and, more importantly, was willing to make the case for a more diverse board at the Board's annual retreat. Over time we hope that additional Board members will actively support this effort.

Gather Staff Feedback: For the first time we are conducting an anonymous workplace "climate" survey to gather staff perceptions on such topics as salary, the performance appraisal process, supervision, and the like. Some questions on the Foundation's commitment to diversity will be included to gauge how staff feels about the Foundation's efforts.

Celebrate Results: It is important for staff to feel that progress is being made and that this is not a one-time or short-term effort. Meaningful results must be achieved each year.

A Work in Progress: Recognize that the goal of having the community foundation better reflect the diversity of the community it serves will always be a work in progress and that this goal must be embedded in the culture of the foundation if continual progress is to be made.

Douglas Jansson, President
Greater Milwaukee Foundation
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