

## Leading by Example Data Collection Resource Guide

This data collection project will be used by community foundation teams dialogue and planning about inclusion, equity and diversity within the foundation. The data will provide a “picture” of the current practices and policies of the foundation, will raise questions for further inquiry, and provide a baseline for action plans that may result from the collective analysis and goal setting of various teams and committees.

As you undertake your data collection efforts, the team should first consider what the data is helping you to understand about the foundation, its experience and capacity to deal with diversity, inclusion, and equity issues, the community you serve, etc. In basic terms, the data you collect and analyze will help your stakeholders develop inclusion and equity objectives that respond to the diversity and equity concerns that are most urgent to the foundation and community.

As you use this data collection tool, there are some key questions to consider:

- What are strategic objectives for undertaking this review? What do we plan to use the data for? For example, strengthening 1 or 2 aspects of the foundation; or undertaking a deeper strategic alignment process that will impact all aspects of the foundation’s culture and practice?
- How narrow or wide is the focus of the *Equity Lens* we will use in this review? What dimensions of diversity do we want to deal with? Will we want to focus on dynamics related to race/ethnicity, class, gender, sexual orientation, inter-generational, immigrant/native communities, etc.?
- What kinds of data are readily available? What types of data are not available? What types of data are collected but not analyzed or utilized for planning and development? What existing community studies and reports can you draw on to inform this data collection process and the analysis and planning that will follow?

There are ten sections in this data collection resource guide. Each corresponds to different aspects of community foundation culture and practice: the community, the governance board and committees, the staff, asset development, asset management, administration/management, program and grantmaking, community convening and leadership, business practices/services and the foundation as an employer. Depending on your strategic objectives, you may wish to combine these categories or include additional categories. You may also choose to collect and analyze this data in phases that coincide with your overall strategy/plan to strengthen the foundation’s inclusion and equity practices.



By income level

	Total Number and % of total
Living below poverty level	
Median Income	
Households with income \$100,000 or greater	

In the most recent assessment of community needs conducted by or for your foundation:

How were priority needs determined?

Who conducted the needs assessments?

Who were positioned as the “experts” in this process?

What are the issues that were identified as high priority?

Which of these are inclusion, equity or diversity related? (and in what ways?)

## **SECTION II: GOVERNANCE (Board and Advisory Committees)**

By race/ethnicity

<b><i>Racial/Ethnic category</i></b>	<b><i>% of total board</i></b>
African American	
Asian/Pacific Islander (if finer distinctions are available, use them)	
Latino/Hispanic	
White/Caucasian	
Native American	

By gender

	% of total
Female	
Male	

Age

	% of total
Under 21	
21 – 35	
36 – 55	
55 and over	54%

By Sector:

	% of total
Corporate/business	
Community based/grassroots leaders	
Civic leaders	
Youth	
Community/volunteer	
Professionals	
Religious/faith sector	

### Composition of Advisory Committees

By race/ethnicity

<b>Racial/Ethnic category</b>	<b>% of total community</b>
African American	
Asian/Pacific Islander (if finer distinctions are available, use them)	
Latino/Hispanic	
White/Caucasian	
Native American	

By gender

	% of total
Female	
Male	

Age

	% of total
Under 21	
21 – 35	
36 – 55	
55 and over	

By Sector:

	% of total
Corporate/business	
Community based/grassroots leaders	
Civic leaders	
Youth	
Community/volunteer	
Professionals	
Religious/faith sector	

### **Composition of Finance/Investment Committee**

By race/ethnicity

<b>Racial/Ethnic category</b>	<b>% of total community</b>
African American	
Asian/Pacific Islander (if finer distinctions are available, use them)	
Latino/Hispanic	
White/Caucasian	
Native American	
Bi-Racial	

By gender

	% of total
Female	
Male	

Age

	% of total
Under 21	
21 – 35	
36 – 55	
55 and over	

By Sector:

	% of total
Corporate/business	
Community based/grassroots leaders	
Civic leaders	
Youth	
Community/volunteer	
Professionals	
Religious/faith sector	
Education	

### **SECTION III: THE STAFF (% based on entire staff)**

By Race/Ethnicity

	Development Staff	Program Staff	Finance & Administrative Staff	Executive/ Management
African American				
Asian/Pacific Islander				
Native American				
White				
Latino/Hispanic				

By Gender

	Development Staff	Program Staff	Finance & Administrative Staff	Executive/ Management
Female				
Male				

### **SECTION IV: ASSET MANAGEMENT: INVESTMENTS**

**Composition of financial managers and advisors used by the foundation in managing and investing assets; if needed, distinctions can be made to reflect internal foundation staff and staff of investment and asset management vendors.**

## By race/ethnicity

	% of total
African American	
Asian/Pacific Islander	
White/Caucasian	
Latino/Hispanic	
Native American	
Others	

## By gender

	% of total
Female	
Male	

**Investing policies**

Does the foundation have any policies governing investments related to diversity and equity? (i.e., minority owned businesses) If yes, what are they?

**SECTION V: ASSET DEVELOPMENT****Composition of Donors**

## By race/ethnicity

	% of total
African American	
Asian/Pacific Islander	
White/Caucasian	
Latino/Hispanic	
Native American	
Others	

## By gender

	% of total
Female	
Male	

## SECTION VI: PROGRAM AND GRANTMAKING

Size of discretionary or unrestricted funds (number and dollar amounts):

Size of donor advised funds (number and dollar amounts):

Proportion of discretionary to donor advised funds:

### Grantees:

Do you ask for data in grant applications regarding the composition of the Board and staff of organizations seeking to be funded?

No

Yes (if yes, check which diversity dimension you ask for:  race/ethnicity,  gender,  age,  other)

If yes, what are the criteria you use in awarding Grants with regards to composition?

Do you request impact data of your grantees that is disaggregated?

No

Yes (if yes, check which diversity dimension you request:  race/ethnicity,  gender,  age,  other)

Do you require equal opportunity policies of your grantees?

No

Yes

### Donor Advised Funds:

Do you have a formal program for educating donors?

No

Yes

If yes, in what ways does this program focus on issues of inclusion, diversity and equity?

In the past year, what amount of donor advised dollars went into the local community as a result of

the foundation's education of donors? Approximately what percent of the overall donor advisor grants did this represent?

Approximately how many of your donor advisors express interest in issues of equity and diversity? Approximately what percent of the overall donor advisors does this represent?

### **Analysis of unrestricted/discretionary grants**

List the # and \$ amount of unrestricted/discretionary grants whose purpose is to address issues of inclusion, diversity and equity:

List the # and \$ amount of unrestricted/discretionary grants which serve minority populations:

List the # and \$ amount of unrestricted/discretionary grants with no direct or explicit purpose to address inclusion, equity and diversity and which do not directly serve minority populations:

List the #, percentage of grants and \$ amount of grants awarded to organizations with leadership of people of color:

List the #, percentage of grants and \$ amounts of grants awarded to organizations with leadership of low-income:

List the #, percentage of grants and \$ amounts of grants awarded to organizations with leadership of women:

### **Current initiatives:**

List initiatives (including issues addressed) of the foundation that are focused on addressing inclusion, equity and diversity:

## **SECTION VII: MANAGEMENT**

List professional development opportunities and supports available for foundation staff related to cross-cultural and intergroup relations, cultural competence and other inclusion, diversity and equity related issues:

Approximately how much staff time and other resources have been committed to these professional development efforts (e.g., % paid staff time or costs of training and materials, consulting and coaching, etc.)

Have any evaluations of these initiatives been done? If so, what is the general assessment of the impact?

## **SECTION VIII: LEADERSHIP, CAPACITY BUILDING AND CONVENING ROLES**

Does the foundation take proactive steps to play a leadership role in community and civic matters related to diversity and equity?

\_\_\_\_\_ No            \_\_\_\_\_ Yes

If yes, list some of the more recent examples, including issues that were addressed and role foundation played (from: neutral convener, catalyst, to advocate, etc.).

If no, list some of the community or civic issues (related to diversity or equity) that are most in need of the foundation's convening or leadership.

Does the foundation engage in capacity building efforts for their grantees?

\_\_\_\_\_ No            \_\_\_\_\_ Yes



### SECTION IX: VENDOR/BUSINESS PRACTICES AND SERVICES

Composition of vendors by race/ethnicity (either individuals hired, or ownership of the business)

	Caterers	Auditors	Legal	PR/Communications	Printers
African American					
Asian/Pacific Islanders					
Native American					
White/Caucasian					
Latino/Hispanic					
Other groups					

By gender

	Caterers	Auditors	Legal	Public Relations Communication	Printers
Female					
Male					

Does the foundation have preferential policies for hiring minority owned or women owned contractors?

No                       Yes

Does the foundation ask to see equal opportunity employment policies of the organizations hired as vendors?

No                       Yes

## **SECTION IX: THE FOUNDATION AS EMPLOYER**

### **Personnel Policies:**

Review your personnel policies. In what ways are they family friendly?

In what ways do they speak to issues of culture and language and racial experience?

### **The Facility:**

Is your facility fully accessible to the physically disabled?

No                       Yes                       Somewhat

### **The Environment:**

Do the photos, artwork, posters on the walls of the foundation depict the variety of cultures, race/ethnicities of the community?

No                       Yes                       Somewhat

### **Recruitment and Hiring:**

Are there formal policies in hiring that give consideration to the racial/ethnic composition of the staff?

No                       Yes

Are there informal practices in hiring that give consideration to the racial/ethnic composition of the staff?

No                       Yes

Are there specific efforts, incentives or preference given to hiring bilingual staff who speak the languages of the community?

No                       Yes

In outreach and recruitment to fill professional staff positions, does the foundation take proactive steps to reach:

people of color  
 women  
 bilingual people