



# 2017 DIVERSITY AND INCLUSION COMMITTEE RECOMMENDATIONS

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In the Spring of 2017, the AFP International Board of Directors tasked the Diversity and Inclusion Committee with examining the resources and supports available to AFP members and making recommendations to bring them in line with current best practices. Through dialogue with committee members, the Chair directed that workgroups be struck to address their top three priorities: redefining Diversity and Inclusion, surveying chapter needs, and identifying methods of providing organizational support.

The recommendations presented here have been prepared by the workgroups and propose an opportunity to create a framework that connect all three areas of need together in support of the Board's strategic goals.

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## INTRODUCTION

In the Spring of 2017, the AFP International Board of Directors tasked the Diversity and Inclusion Committee with examining the resources and supports available to AFP members and identifying changes that were needed to bring them in line with current best practices. Through dialogue with committee members, the Chair directed that workgroups be struck to address their top three priorities: redefining Diversity and Inclusion, surveying chapter's needs, and identifying methods of providing organizational support.

The recommendations that accompany this report have been prepared by the Definition Workgroup and present an opportunity to create a framework that connects all three areas of need together in support of the Board's strategic goals.

# SECTION I: DEFINITION WORKGROUP

## BACKGROUND

### The challenge of redefining diversity and inclusion

At their core, diversity and inclusion initiatives are focused on removing barriers to participation and are most effective when they are implemented at the level of policies and practices. Achieving this level of effectiveness, however, requires a significant amount of effort and planning that is built on a solid understanding of what it means to be “diverse” and “inclusive.” As the bedrock on which future efforts are built, this component is essential.

To ascertain the level of understanding of these values, and their preparedness to implement them, chapters were asked to share their definitions of diversity and Inclusion as well as their successes and challenges by the Survey Workgroup. Based on their summary findings of 108 respondents, the Workgroup found that chapters span a wide spectrum of understanding with the differentiation of the two terms (diversity and inclusion) being the most common and significant challenge. This signals to us that the need for a new definition is timely and that, if successful, can increase the effectiveness of Chapters with their implementation.

Looking deeper into the survey results, the Definition Workgroup was interested to note that a significant proportion of the Chapters indicated they had chosen to adopt AFP International’s definition of Diversity and Inclusion – either in whole or in part. This raised the question: if chapters are applying a similar definition of diversity and inclusion, why are some able to make successive steps forward while others struggle?

The most readily apparent answer was that Diversity and Inclusion on their own are not sufficient on their own to support chapter initiatives that remove participatory barriers. Fortunately, the mix of chapters that responded to the Survey work group provided us with the opportunity to identify what was missing.

### Expanding Diversity and Inclusion

In reviewing the best practices of successful chapters, Equity and Access were identified as the two concepts that were present in their practices but missing from those that were struggling.

The impact and value that Equity and Access brought to successful chapters, and the challenges that resulted in chapters where they were not present can be observed in the summary statements below:

#### Without Equity and Access

- Without inclusive practices, there can be no diversity in our chapters
- Without equity, diverse members of our chapters can’t participate despite being included
- Without access, inclusive practices that provide equity to diverse members can’t be applied

## **With Equity and Access**

- Inclusive practices allow diverse members of our community to participate in AFP
- Equitable participation of diverse members allows us to include their ideas
- Accessible practices ensure that all diverse members of our community have the opportunity and ability to share their ideas

For chapters who have been challenged in implementing Diversity and Inclusion, Equity and Access can provide direction on how best to engage diverse members of their community to participate in the development of new ideas that can remove the barriers they have been facing and push the chapter forward.

For chapters who have demonstrated strength in Diversity and Inclusion, integrating Equity and Access into their framework ensured that their successes were tied to policies and procedures that cannot be lost with the departure of a member or a volunteer.

By combining Equity and Access with Diversity and Inclusion we create a powerful new acronym: IDEA.

### **What's the big IDEA?**

At the root of our profession are the philanthropic practices that we bring to our work on a daily basis. These are continually being renewed through the contributions of our members and diversity and inclusion initiatives have become a powerful tool for ensuring that we continue to reflect the evolving diversity of the communities we are embedded in. With the introduction of Equity and Access we add two new tools that enable us to increase the impact of this renewal process by incorporating a wealth of ideas and perspectives that have previously been marginalized and excluded.

The importance of this change cannot be understated as it represents a fundamental change in how we approach Diversity and Inclusion. By adopting IDEA we become inclusive of the diverse minds, personalities, and experiences that accompany the diverse bodies that our current initiatives prioritize.

### **Turning IDEA into reality**

There is tremendous potential in implementing and embedding IDEA in the policies and practices of AFP International, however we wish to caution that creating real and lasting change using this framework will take time – especially at the chapter level. By implementing the recommendations provided by the Definition Workgroup you will be laying the groundwork that will support this vision and provide it with the stability needed to reach a point of maturity where it cannot be easily undone.

Alongside our recommendations come those of the Mentorship Workgroup and we look forward to exploring how IDEA can support them in assisting chapters to become more inclusive, diverse, equitable, and accessible; potentially as a method of reporting progress made towards goals in each of these categories.

## **Conclusion**

Adopting IDEA will require considerable stakeholder engagement, constant reinforcement, and sufficient resources to accomplish its objectives; however as fundraisers we are accustomed to doing what is right, even if it is difficult. By implementing the recommendations included with this letter, we believe that the social good they create will allow AFP International to achieve its strategic goal of becoming a global influencer and, most importantly, help us to achieve the potential contained in every current and future member of AFP.

Thank you very much for the opportunity to share these ideas with you.

Best regards,

*The AFP International Diversity & Inclusion Committee Definition Workgroup*

## **Inclusion, Diversity, Equity and Access (I.D.E.A) Statement of Principles**

The Association of Fundraising Professionals (AFP) is committed to developing and maintaining a diverse organization that reflects, is responsive to, and embraces the diversity of the communities we serve throughout the world; respecting and valuing all people.

AFP is committed to promoting an inclusive, equitable and accessible organization where every member, volunteer, staff and board member can realize their potential and where their contributions are valued.

AFP recognizes that Inclusion, Diversity, Equity & Access (IDEA) are central to its mission. The following are AFP's Statement of IDEA Principles;

- Recognizing others as different but equal.
- Exercising respect and empathy for all.
- Practicing trust and integrity that encourages and embraces the different and multiple voices in organizational dialogues.
- Demonstrating genuine appreciation for different viewpoints and opinions, while encouraging and facilitating dialogues among these diverse groups.
- Practicing and encouraging transparent communication in all interactions.
- Developing participative decision making, problem solving, and team capabilities.
- Exploring potential underlying, unquestioned assumptions that interfere with inclusiveness.

## **DEFINITIONS**

### **Inclusion**

The ability of AFP to attract, retain, accommodate, and involve a range of diverse people who are valued, accepted, and comfortable at the international, national, regional or local chapter level.

### **Diversity**

AFP defines diversity as a core value. It is an inclusive concept encompassing, without limitation, race, color, ethnicity, gender identity, sexual orientation or identity; religion, nationality, age, economic class, educational level, language, mobility and ability, geography, and marital and parental status. The state of being diverse means having the broadest possible representation of individuals, experiences, and perspectives in all-encompassing terms.

## **Equity**

Creating a level playing field for individuals or groups according to their respective needs, which may include equal treatment or treatment that is different but is considered equivalent or fair in terms of rights, benefits, obligations and opportunities.

## **Access**

The commitment to foster attitudes, behaviors, and procedures to facilitate access that promotes equity and diversity, fosters inclusion and allows people to maximize their contribution to our association and communities that our members serve.

## **ROLES AND RESPONSIBILITIES IN ACHIEVING THE BIG IDEA & BOARD POLICY**

*The Association of Fundraising Professionals (AFP) realizes achieving Inclusion, Diversity, Equity and Access (IDEA) is an evolutionary process that will require sustained commitment over time demonstrated in the ongoing dialogue and actions by AFP and all its stakeholders.*

WHEREAS the vision of AFP is to stimulate a world of generosity and positive social good through fundraising best practice; and,

WHEREAS the mission of AFP is to empower individuals and organizations to practice ethical fundraising through professional education, networking, research and advocacy; and,

WHEREAS philanthropy requires a continuous renewal of ideas and perspectives that reflect the evolving needs and diversity of the communities it is embedded in through the equitable participation of its members; and,

WHEREAS AFP recognizes inclusion as essential to the vitality; creativity; innovation; strength; and, impact of any organization; and, that inclusion involves respectful environments intentionally open to all; values and welcomes the contributions and equitable participation of every individual; and, reflects and represents those they serve; and,

WHEREAS AFP recognizes the diverse makeup within and between the communities that we serve and values these differences as integral to our overall makeup, operation and effectiveness as a worldwide association.; and,

WHEREAS AFP will be guided by the principle that equity means more than treating people in the same way; it requires creating a level playing field for individuals or groups according to their respective needs, which may include equal treatment or treatment that is different but is considered equivalent in terms of rights, benefits, obligations and opportunities; and,

WHEREAS AFP is committed to fostering attitudes, behaviors, and procedures to facilitate access that promotes equity and diversity, fosters inclusion and allows people to maximize their contribution to our association and communities they serve; and,

WHEREAS AFP is committed to inclusion, diversity, equity and access in the selection process and criteria for all staff, volunteer positions, board appointments, committees and working groups; and,

WHEREAS the AFP Board will set IDEA goals appropriately aligned with their position as an international organization; and,

WHEREAS the President and CEO will report to the Board twice each year on initiatives taken to advance our inclusiveness, and demonstrate our commitment to diversity, equity and access; and,

WHEREAS AFP chapters will set IDEA goals, consistent with the overarching AFP goals but tailored to meet each chapter's unique constituents and stakeholders;

THEREFORE BE IT RESOLVED THAT AFP will lead our sector in achieving inclusion, diversity, equity and access by taking continuous, quantifiable actions, dedicated to these goals, throughout AFP governance; leadership and staff; chapters; committees; membership; volunteers; and, programs and activities.

## DEFINITION WORKGROUP RECOMMENDATIONS

- Change the Diversity and Inclusion committee to the Inclusion, Diversity, Equity and Access (I.D.E.A) Committee
- Ensure all IDEA Committee initiatives reflect inclusion, diversity, equity, and access.
- To ensure a culture of philanthropy among all stakeholders, a definition of philanthropy from the AFP perspective needs to be created.
- Move one of the Inclusion and Influence goals for the AFP Ten Star/Ten Star Gold award from optional to a required goal.
- Measuring success relies on data. Collaborate with staff and other workgroups to create IDEA benchmarks/scorecard for chapters to measure and drive success.
- Chapter presidents will report through the annual accord process on initiatives taken to advance chapter inclusiveness, and demonstrate their commitment to diversity, equity and access

## SECTION II: CHAPTER SURVEY WORKGROUP

### BACKGROUND

From June – August 2017, the Chapter Survey Work Group designed the 2017 Chapter Diversity and Inclusion Survey. Though the original focus of the survey was to determine chapters top five success and top five challenges, the survey was expanded to include questions related to the work of the two other work groups.

The survey was open from September 1-20, 2017. Of the 195 active AFP chapters, 108 completed the survey for a survey response rate of 55.38%. 85 percent of Canadian chapters responded, 53.66 percent of U.S. chapters responded and 33 percent of Mexican chapters responded to the survey. The Hong Kong chapter did not complete the survey but did reach out by e-mail. The chapter in Egypt did complete the survey but after the survey closed.

The survey was available in English, French, and Spanish.

### SUMMARY OF FINDINGS

- Chapters think of diversity and inclusion in terms of race and gender
- Chapters' definitions of diversity and inclusion are wide and varied and often reflect the community in which they are located
- Limited resources (people, time, and/or money) are a major barrier for chapters in implementing diversity and inclusion activities
- Sixty-two percent of chapters responded they had applied for Friends of Diversity Designation. Of those chapters that did not apply, “No board member to take the lead” was the top reason given for why they did not apply. A variety of other reasons given for not applying included: not having a diversity committee; lack of diversity in the community; limited resources; did not meet the criteria; just beginning to focus on Diversity and inclusion.
- Sixty-nine chapters provided their strategies and goals, relating to diversity and inclusion
- 31 chapters indicated their chapter does not have a definition of diversity or inclusion; 18 said they are not working on a definition while 15 indicated they are working on a definition of diversity and inclusion
- Diversity and inclusion are included in 71.02 percent (76) chapters' strategic plan. Those that did not include diversity and inclusion indicated the reasons were: “no board member to take the lead;” “diversity is not a focus;” and “our chapter does not have a strategic plan”

- To the question, “Does your chapter utilize the AFP Diversity Chair resources on the chapter management resource guide?” 56.60% says “Yes” and 46 chapters (37.73%) indicated “No.” The top reason given for not using the resources: “I am unaware of these resources”
- 53% of chapters responding would like for a member of the Diversity & Inclusion committee to contact them regarding their D&I program. Of those respondents, 35% (20 chapters) have never applied for the Friends of Diversity designation.
- The number one reason for chapters’ diversity and inclusion successes were “Board Engagement” followed by “Board Leadership” and “Financial Resources”
- Top reasons for challenges faced by chapters related to diversity and inclusion were:
  - Lack of Leadership in This Area
  - Chapter is Focused on Other Priorities
  - Confusion About What Diversity Means
  - Community Is Not Diverse
  - Lack of Interest

## IN THEIR OWN WORDS

Open-ended questions were asked to allow chapters the opportunity to share their definitions of diversity, provide examples of strategies and goals related to diversity and inclusion, share success and challenges, identify potential community partners for collaborative efforts on Diversity and Inclusion, and to clarify answers on previously asked multiple-choice questions. These responses, especially those related to successes and challenges, will be used to identify best-practices that other chapters may be able to implement and emulate and address barriers to a chapter’s ability to successfully address diversity and inclusion initiatives.

### Examples of Successes in Our Chapters

- “Making diversity and inclusion a chapter objective and establishing a committee was our first success.”
- “Our biggest successes have been recruiting a wide array of new members through our scholarship program.”
- “No cost ‘open-house’ programs for potential new members.”
- “Develop a D & I statement”
- “Hosted a multi-generational panel to discuss diversity and inclusion”
- Education planning in partnership with the indigenous community to build fundraising capacity within their communities.”
- “Members coming in from rural areas”
- “Our recent program . . . ‘Diversity in the Workplace: Information on serving and employing the deaf and hearing impaired community.’”
- “We see diversity as not just color, race, or ethnicity. We also recognize and include physical, religious, and sexual diversity in our attempts to be totally inclusive.”

- “We have made an effort to include or local areas in our geographically Valley – we meet at a middle location between two major cities.”

#### Examples of Challenges Experienced by Our Chapters

- “Limited diversity within board members’ personal and professional networks.”
- “We struggle to get members engaged in our chapter leadership and initiatives. They are busy professionals, sometimes at small or 1 person shops, and sometimes their executive directors don’t support their involvement in AFP leadership because it’s going to take away time from their day-job.”
- “Our local community of fundraisers doesn’t seem to have a great deal of diversity.”
- “Financial resources are limited to apply to a strategic and successful effort in this area.”
- “... I find it challenging to find members of our chapter who would like to help with the D & I work as part of the Diversity and Inclusion Committee. I would like to have an active committee focused on D & I to energize the board and membership base.”
- “Not enough volunteers to maintain focus on this; we barely have enough to keep our program schedule going.”
- “Our fundraising community is not very ethnically diverse, even though our geographic community is.

## CHAPTER SURVEY WORK GROUP RECOMMENDATIONS

Data from the 2017 Chapter Diversity & Inclusion Survey indicated areas that need to be addressed however, there is no need for the Survey Workgroup to formulate recommendations for these issues given the work already underway by staff, other workgroups, and the Diversity and Inclusion Committee. These areas are:

Chapters are confused about the definition of diversity and the definition of inclusion and the difference between the two. The work of the Definition Workgroup will provide chapters with a better understanding of what diversity and inclusion are and clarification of differences between the two.

Chapters are interested in developing diversity and inclusion initiatives but need help. Several AFP efforts will be beneficial in promoting diversity and inclusion in chapters including:

- Improving chapter awareness of diversity resources available on the AFP website
- Providing more information to chapters about the Friends of Diversity (FOD) designation and the application process
- Pairing chapters applying for the FOD designation with a mentor chapter
- Recognizing those chapters that mentor other chapters in the FOD process

These efforts will promote diversity and inclusion at the chapter level and develop resources for chapters to help them become more diverse and inclusive.

Specific Recommendations from the Chapter Diversity and Inclusion Survey Workgroup are:

- AFP chapter resources should include small, doable, low-cost or no-cost ideas that chapters (of all sizes) can implement on diversity and inclusion. It is important that distinctions between diversity and inclusion are clear and well-defined. Though often grouped together diversity and inclusion activities are different and implemented in different ways.
- AFP IHQ has made great strides in improving and implementing diversity and inclusion activities. In continuation of those efforts, it is recommended that AFP model diversity and inclusion on its boards and committees, at conferences, and in its communications with members and chapter leadership. Meetings and communications materials should represent a wide range of voices; include speakers of diverse backgrounds beyond ethnicity and gender.
- AFP must also ensure that members are not unintentionally excluded from experiencing the benefits of membership. AFP's website, newsletters, e-mail blasts, etc. should be ADA compliant. Meetings and conference should be accessible to our members that are deaf, hearing, and visually impaired.
- In modeling diversity and inclusion, measurable goals and objectives should be developed to track the implementation of these recommendations and reviewed at all AFP Board meetings and at Membership Division meetings.

## **SECTION III: CHAPTER MENTORING WORKGROUP**

### **BACKGROUND**

The Chapter Mentoring Workgroup was tasked with developing a diversity mentoring program for AFP chapters.

The workgroup discussed a process of determining candidates for mentoring, areas of mentoring, and benchmarks. The group decided to implement their work in phases.

#### **PHASE ONE – RESEARCH (SEPTEMBER 2017)**

The workgroup determined that the Friends of Diversity Designation (FOD) would be used as a metric to determine mentoring program candidates. The workgroup also saw an opportunity to increase the number of chapters applying for the 2017 FOD designation.

Using the results from the 2017 Chapter Diversity Survey, the workgroup will identify:

- Chapters that have not applied for the FOD designation, and place into two categories (40 chapters)
  - Those that had most of the FOD requirements: the low-hanging fruit. (19 chapters)
  - Those chapters that have no initiatives and are unable to apply (21 chapters)
- Chapters that have applied for and received the FOD designation (67)
  - What they are succeeding in and what areas can they mentor other chapters

#### **PHASE TWO – CONSULTATION (OCTOBER 2017 – JANUARY 2018)**

The workgroup will work to raise the number of FOD designation applicants/recipients from 38 percent of all professional AFP chapters to 50 percent.

- The workgroup would like to expand the current workgroup to 8-10 people that will reach out to chapters and help them complete their 2017 FOD applications by January 31, 2018 (October 2017 – January 2018)
- Create a toolkit to train workgroup members in completing the FOD application so they are better prepared in chapter outreach.
- Host a webinar focus group for chapters that completed the 2017 Chapter Diversity Survey to get their input on the FOD application, their successes and failures, and the next steps.

## **PHASE THREE – DEVELOP AN ADVANCED FRIENDS OF DIVERSITY DESIGNATION (FEBRUARY -JULY 2018)**

Based on the survey results, the workgroup determined that an advanced FOD designation needs to be developed to keep chapters engaged in diversity and inclusion.

- The workgroup will reach out to chapters that have completed the FOD application and host a focus group at the International Fundraising Conference in New Orleans to get feedback on how to make the process more challenging
- Develop and review new criteria for the 2018 FOD designation process, including a mentoring component for those aspiring for the advanced FOD designation.
- Open the 2018 FOD process in July 2018 with the new criteria, allowing chapters to test the mentoring component July-December 2018

## **PHASE FOUR – REVIEW**

The workgroup will host additional focus group after the 2018 process and seek feedback on what worked and what needs to be changed for 2018.