

## **EDI as an Imperative in Stakeholder Engagement and Fundraising**

Wednesday, December 16, 2020

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*Captioned by Joshua B. Edwards, RDR, CRR*

>> DAVID STYERS: Thank you all for joining us today for our webinar, EDI as an Imperative in Stakeholder Engagement and Fundraising. I am David Styers, director of learning and leadership programs at the League. And we welcome you to our new online webinar platform and trust that you found your way here seamlessly and successfully.

Before we get started today, I wanted to share a few quick ways you can interact with each other, and also with our speakers. On the right side of your screen, you should see the chat and Q&A functionality. Chat allows you to say hello to other attending the webinar and to make general comments throughout the session. And feel free to introduce yourself.

The Q&A functionality is for the sole purpose of asking our speakers questions that you would like them to address. Any questions put in the Q&A section will only be seen by our speakers. Also should you wish to access closed captioning for today's session, the link is listed directly below the screen in the session description. We would ask that in the session, you click on the feedback link and fill out a short evaluation form for us.

Finally this webinar is made possible by a generous grant from the Andrew W. Mellon Foundation and grants from American Express, the Baisley A. Fund, Ford Motor Company Fund, Howard Gilman foundation, and the National Endowment For the Arts, as well as in part by public funds from the New York City Department of Cultural Affairs and partnership with the City Council. Want to thank

all of our funders and sponsors for their support.

It's my pleasure to introduce our presenter and moderator for today, Ron Schiller, founding partner of the Aspen Leadership Group, president of the NPR Foundation, vice president of alumni relations at the University of Chicago and roles at Carnegie Mellon University, Northeastern University, New England Conservatory of Music and the Eastman School of Music. As an author, Ron's newest title is "Diversity, Equity and Inclusion: Strengthening Engagement and Fundraising Through Inclusion." Again want to thank Ron for being with us today to share his expertise with our panelists and I will turn it over to you to lead us from here, Ron.

>> RON SCHILLER: Very good, thank you, David. And it's good to be with all of you. And I'm delighted to be joined by my colleague and coauthor of the diversity, equity, and inclusion in advancement book, Angelique Grant. And also we will have panelists joining us Ed Yim and Lee Bynum and Sharon Hatchett.

So we will pull up the slide deck and say welcome to everybody. And move on to the next slide. The topic for today is EDI as an Imperative in Stakeholder Engagement and Fundraising. And by that, we mean more than a moral imperative which it certainly is, but also an imperative in the way that we go about our work in engagement and fundraising.

Go to the next slide. There are many, many topics that we could cover in this webinar, but we have such a short time that we decided to narrow in on the following five bullet points under these heads of culture, team, and then applying culture and team to fundraising and volunteer engagement.

First of all, the importance of moving from awareness to action, to create sustainable behavioral change, there is thank goodness a lot of awareness, increased awareness especially this year around the importance of EDI. But we

need to move past that awareness through assessment and through aspiration and clear planning and clear goal-setting to create sustainable behavioral change.

And when we jump directly from awareness to action, we don't achieve sustained behavioral change. And then we want to assess where our organization is in its EDI journey as well. We are going to cover recruitment and retention of a diverse team starting with the why, and the importance of being candid and honest with candidates for board positions as well as candidates for our staff positions who are going to bring diversity and the importance of that diversity.

And then fundraising and volunteer engagement we are going to discuss --

(Technical difficulties) -- stakeholders and donors. Let's move to the next slide. So in an inclusive culture, we want to start by defining equity, diversity and inclusion. I will just give you some definitions that come from our source that we rather like and include it in the book. Definition of diversity, the presence of different types of people from a wide range of identities and with different perspectives and experiences.

And we want to underscore here that while there is significant conversation around race and ethnicity related to diversity, that we are talking about all different life experiences, all different identities, all different perspectives and experiences in our organization today

Definition of equity, the process of ensuring equally high outcomes for all and removing the predictable of success or failure --

And the definition of inclusion, the process of putting diversity into action by creating an environment of involvement respect and connection where the richness of ideas backgrounds and perspectives are harnessed to create value. In

short as Angelique likes to say, diversity is counting heads but inclusion is making heads count.

So inclusion is all about making equity and diversity count. I will just make one more point here on this slide which is that we've seen over the course of decades those of us who have been involved in the nonprofit sector for a long time, significant conversations and efforts around diversity and equity. But what we also have found and have learned, I think, is that without an emphasis on inclusion, that we can lose some of the progress that we've made in our diversity and equity work sometimes is not sustainable

We will move to the next slide. And I will turn it over to my colleague Angelique.

>> ANGELIQUE GRANT: Welcome, everyone. So most equity, diversity and inclusion efforts focus on awareness, right. And that's great. But we've found that that's really not enough, right. Others want to jump immediately to action because action isn't really going to lead to sustained change without assessment and aspiration.

So here is a model that we have really created to take organizations through this process of behavioral change. I truly believe that this helps because you then discover the pathway in which you can implement equity, diversity and inclusion as a result. So when you look at awareness, starting with awareness on the far left-hand side, you are aware of. We are learning, right.

We are aware of the research, the changing demographics. We are aware we are missing out on our donations or donor engagement or volunteer engagement if you may. We are aware of discovering what EDI means for your organization, your board, this common language, unconscious bias. There's the

grappling stage.

Then you move to assessment. Take a moment to assess where you are in your journey and where you would like to be aspirationally. Right. I believe that every organization should conduct an EDI audit and assessment if they truly are serious about behavioral change, right. What are your organizational gaps? What are your current behaviors? How are your organizational policies affecting your race, equity team goals? Right.

Are your governing board bylaws impacting your board member diversity recruitment efforts? And as an organization, are you non-racist or actively antiracist? So a formal EDI assessment is designed to provide an understanding of not only what stakeholders think, but how and why they think the way that they do.

So by doing so, this will help you create your plan which is really the next step is aspiration, right, moving towards developing an overall plan by asking yourself where do you want to be? Where do you want to grow? Right. It's also about identifying your values, right. Organization's core values informs how the organization goes about its work in fulfilling its vision. They shape the acts, the behavior of those working within the organization.

And therefore, when you look at your overall aspiration which is your plan, you then move it forward because one, you have had the assessment. You have developed the data and now behavior change, integration, adapting your systems and structures, right.

And choosing actions that will get all stakeholders involved by developing the time line and also investing in allocating resources towards your ED and I efforts. And then lastly which is just as important is accountability, right. Now that you have the roadmap, who is going to lead us down this journey?

We believe that inclusion councils which are your DE&I ad hoc committees and/or equity councils, inclusion councils, this group does two things. One it leads you through your ED and I journey; and two, it's an accountability partner with them. It's holding the entire organization accountable for implementation, developing measurable goals, tracking progress, shared ownership and the like.

So you can apply this. This is a process. You can apply this to a program. But when you are looking at EDI, apply it to your overall organization. Next slide.

Here is a slide that highlights the gaps that exists with volunteer boards. Research shows 90 percent of nonprofit CEOs are white; awareness. 90 percent of nonprofit board chairs are white; awareness. 22 percent overall have actually done an actual EDI audit and assessment. So they have gotten from awareness close to assessment. And here in the 27 percent of organizations with 100 percent white boards, 62 percent of these have leaders who say racial diversity is important, but yet and still 10 percent say demographics are a priority in the recruitment. A little bit more of the action pieces.

It's important to understand and take a look at these sorts of this research if you may. Next slide. And this comes directly from board source. Here is a slide that highlights the gaps that exist between orchestra, right. It's not enough just to be aware. It's what are you going to do with this awareness? 94 percent of orchestra' executive directors and CEOs are white.

12 percent of orchestra have done a diversity audit and have a diversity plan. Right. Figure is kind of low, so there's some room to grow there. And 30 percent have a recruitment plan designed to promote equality. Next slide.

Now I want you to take a look at your organization and this DEI maturity model in order to understand how you can create an inclusive culture, you have to understand your current behavior and activities. Hence, the reason why this model becomes important. I found that a lot of organizations were really grappling with where they are. They are working on activities and they are, like, oh, you know, we kind of know where we want to go.

But we don't know, you don't know what you don't know. Right.

(Laughter)

So this helps you identify your current level, and it helps you to find out where you are going to be aspirationally. And here is a quick breakdown. When you look at Level 1 which is the far left, it's the foundational level.

And I call it the awakening level. You have internal policies to ensure external legal requirements are met. You are compliant, right. You are reactive. Here is where you have your basic, you know, EDI statement from the EEO sort of government standpoint where they talk about race, class, gender, we treat everyone equally. You don't have giving opportunities that reflect diverse, you know, opportunities

And this is what I call the basic bare minimum. Basic bare minimum. At Level 2, the awareness, here is where organization also poking at ideas. They have great intention. They have programs that are provided to address specific gaps and challenges. They may have an ad hoc committee for a standalone committee that focuses on diversity. Maybe some trainings here and there. A DE&I statement, possibly. This is where you have the early learning of EDI

It's all great work, but I also like to call it drive-by EDI, a little bit of this, a little bit of that. No major strategy in place. That's important to understand at this

stage. And there's somewhat of a commitment from leadership, but they are not involved in your efforts.

The third phase is understanding, everyone is committed. This is what I call it. DEI is defined and widely embraced. There's a comprehensive and measurable strategy and goals that are set. You have leadership buy-in and leadership is involved. There is no us and them at this level.

Right. You've identified some systemic barriers. Your recruitment onboarding retention processes are intact. You have an inclusion council that's robust. They have a budget, right. That's Level 3 where you have understanding

And then the last level is where you have the changed behavior, call it the woke. Everybody's woke there. You have a robust inclusion council. Everyone is active and respects the work of EDI with a comprehensive measurable plan. And here it's the integration of it all, right, from all of your volunteer groups and boards to all of your talent management, your organization is walking its talk. Stakeholders feel it, see it. And no one has to be encouraged or reminded that diversity, equity and inclusion is important

So when you look at your organization, think about where you are in this DEI maturity model. And keep in mind the awareness to action is a process, and the DEI maturity model is actually the stage that you are in as it relates to equity, diversity, and inclusion.

Next slide.

>> RON SCHILLER: So we find that in the DEI maturity model, that around five to 10 percent of the organizations we work with across the nation identify themselves as being still at that foundational level where largely they are reactive when it comes to maybe dealing with a racist remark that has been made or some



kind of discrimination issue in the workforce. But they are largely reactive.

And when we conduct search, we find that if we ask for a diversity statement, very few organizations have that. What they give us is an equal opportunity statement that could have been written 20, 30, 40 years ago, but a number of organizations are at that foundational stage.

Most nonprofit organizations we work with identify themselves at stage two. They are engaged in awareness, especially this year, there's been a wonderfully much more attention. And there is more training. It's maybe not just one training a year, but now maybe it's one a month. So it's still something we do, however, on Wednesday afternoons or at the last Wednesday of the month. But it's not fully integrated into our planning and into our work.

And then probably 60 or 70 percent of organizations that we work with identify themselves as being at stage two, maybe another ten or 20 percent have moved to stage three and they have some real plans in place and EDI is integrated into all of the work and all of the plans and almost no organizations identify themselves as having really changed their behavior so that all of their diverse stakeholders and team members would say, yes, I feel valued, valuable, and a full sense of belonging.

We do find that even if there is a lot of conversation, it is often happening in the staff. The staff is trying to solve this, and that we often make the mistake of failing to include our stakeholders, including those who are the ones that we want to reach but who are not yet feeling part of our organizations, and asking them as Angelique talked about not just how to involve them, but why they want to be involved, how they want to be involved, not just the fact that we want to involve them.

So we want to underscore here that it's important for our work in philanthropy in particular, but our work in all engagement to make sure that we are applying our inclusion approaches to our stakeholders to take time to assess and to listen sometimes to some very negative experiences, but to listen to how our donors and other stakeholders currently view the organization.

We will go to the next slide. So we are going to take a poll here having had a chance to look. I'm just going to summarize each of these four stages. We are compliant. We want to just note for those who are involved here, you are compliant and respond to problems as they arise. Is your organization largely at that level? Or we have episodic training in EDI. Most are aware of the importance. So that's more episodic Level 2.

Level 3, measurable EDI goals are in place. Our leaders are committed and resources have been allocated. That's a more strategic level. Or four, all team members and stakeholders feel included and EDI has increased our stakeholder engagement and fundraising results in measurable ways. That's sustained.

If you go to the right side of your screen, you will see at the far right on the top a poll, the word "poll." If you click on "poll," we are going to start the poll. And we ask that each person vote which level is your organization at? Which level best describes your organization? And Danielle, is the poll active?

>> Yes.

>> RON SCHILLER: Okay, terrific.

>> ANGELIQUE GRANT: I'm not Danielle, but I see it moving.

(Laughter)

>> RON SCHILLER: If as you are over there, you click on "show

results," you will actually see as people vote where they are. Okay. Terrific. So thank you. Give it another 30 seconds or so. Let everybody find that poll button.

>> ANGELIQUE GRANT: Looked like it may grow over the time of this presentation, too.

(Laughter)

>> ANGELIQUE GRANT: A lot of twos, level twos.

>> RON SCHILLER: Yeah, and a lot of level ones, so we definitely have room. Good, well, thank you. We will stop the poll there. But as you can see, there is room to grow. And we offer this maturity model not to say that it's exactly the right one for you or that it's completely comprehensive, but rather it's been useful to a lot of our colleagues and clients as just a way of saying taking what seems like an overwhelming challenge and breaking it down and saying okay, let's say in our recruitment efforts we are at Level 1; how will we move to Level 2?

In our engagement with our audience, we are at Level 2, how can we move to Level 3? And so on. You can break down the various components of what we are doing and think about how we can move through from level 1 to level 2 to level 3 because what we hope is when we come back to talk with you next year, the following year, that we will see very few of you left at level 1 and many more of you identifying at level 3 and well on your way to level 4.

So we will move to the next slide. And here, well -- yes. So in this particular section, I just wanted to underscore a couple of key takeaways. One that knowledge is not enough, that awareness needs to lead to action. We see a lot of awareness and that's a great thing and we need to have it. And then we see some organizations jumping right into activity. And activity is great, but it's not necessarily going to create sustained behavioral change without going through that full sweep of

assessment and aspirations that Angelique talked about.

So that assessment provides a basis for the setting of measurable goals and make sure that you are getting not just team member, internal team members, but diverse stakeholders involved in that assessment process as well. We will go to the next slide.

So in our -- we are going to turn now to recruitment and retention, and talk about three topics, the importance of starting with the why; EDI as is a moral imperative and an engagement and fundraising imperative. The why is it's the right thing to do. But beyond it being the right thing to do, it's important to the fulfillment of the missions of our organizations. When we assess that to communicate honestly and also to be vulnerable. Next slide.

So now I would like to ask Angelique if she would lead us with our panelists, Ed Yim, Lee Bynum, and Sharon Hatchett, if you could come on screen, we would like to have a conversation about how your organizations think about engagement and fundraising being more than just a moral imperative which they are, but also an engagement and fundraising imperative. Angelique?

>> ANGELIQUE GRANT: Yeah. So as Ron has shared, it's good to see our panelists join us. Ed, Sharon, Lee. So why don't we start with Ed. And for all of you who are joining us, you read everyone's background. It's an amazing group that we've here.

But Ed, what we are going to do is have you answered question. What are the engagement and fundraising imperatives for equity, diversity, and inclusion in your organization given your mission?

>> ED YIM: Hi, everyone. It's great to be here. Thank you for asking me to be here. I recently finished as executive director and CEO of the American

Composers Orchestra. And really I think there's one overall thing about engagement and philanthropy that for me comes down to the work network. The broader our networks are, the better set up we are to raise money, to engage our community, to be reflective of our community. And if we don't have a diverse set of voices at the table, then we are really just fishing in the same pond over and over and over again.

And as the demographics of the United States continue to evolve, orchestra are really in danger I think if they don't pay attention to this imperative of being even more of an ivory tower than people perceive us as.

And so when I'm thinking about staff members, when I'm thinking about board members and the people who make up the organization, diversity is not just having an array of ethnicities and nationalities around the table. It is about having different perspectives and different networks around the table. And, you know, I can boil it down to something very simple like foundations have made diversity, equity, and inclusion on imperative in their giving strategies.

And that's a real tangible thing. A friend of mine, a composer says the color of change is green. So, you know, when the money is there, and they are saying if you want this money, then you have to adhere to these values, that's a very real thing.

But I actually, I find it somewhat disturbing to boil it down to a monetary transaction. It's about being connected to the community. It's about being connected to a broader array of perspectives and community relationships that I think is why diversity, equity, and inclusion is actually a tactical imperative, not just the money. And then I will just finish by saying that, you know, I think it's easy for organizations to say well, we have three Black board members now and we have

two Asian, you know, staff members and we have four Latinx, you know, volunteers or whatever.

And they are counting people by the color of their skin, right. And I think we are getting to a point where we are going to dig deeper into well, why do we want those people there? Race is a political construct anyway, right. But it's about being connected to more communities and more people and having them be on board with what our organization is doing.

So that's a little bit of a word jumble, but I think the imperative lies in connection and networks, and having as broad a community to belong to as an orchestra as possible.

>> ANGELIQUE GRANT: Thank you, Ed. And I hear you, it's not about representation. It's about participation, right.

>> ED YIM: Correct. I was going to get to this later, but my friend Jennifer Co who is a brilliant violinist and social activist read somewhere and I am going to have to get the source for this. But critical mass is important, too. Right. So studies have shown that if you have one Black person at the board table, that there's a tendency for, unless you have someone really exceptional and we know there are people like that, but there's a tendency of trying to fit in, right, and not stick out too much.

And then if you have two people that there's this weird dynamic of both of them trying to kind of fit in and seeing who can fit in more, it's not until you get to three the study shows. And I will track this down and get it out to people. But until you get three, the voices aren't really participating. They are just trying to, you know, have a seat at the table.

I didn't explain that very well, but I think you get the point.

>> ANGELIQUE GRANT: No, you explained it perfectly. And we are going to wait for that article.

>> ED YIM: Yeah, I will find it.

>> ANGELIQUE GRANT: I want to see it. Thank you. And for those of you, that is the chief content officer and senior vice president at WQXR and board member of the League of American Orchestras. So thank you.

>> ED YIM: Thank you.

>> ANGELIQUE GRANT: So next we have Sharon Hatchett who is a volunteer council member at the League of American Orchestras. And very passionate from what I've heard about you, Sharon, very passionate and involved as a volunteer with an organization whose mission is to bring Blacks into classical music, right. So with your specific lens of EDI, what lessons can you share that would be helpful to orchestra who have not had, you know, have had that folded into their mission? So I would love to hear your response.

Is your mic on, Sharon? I saw her a second ago.

>> RON SCHILLER: There she is.

>> SHARON HATCHETT: I am so sorry. My technology with this Boomset is not compatible. It keeps cutting me off. So forgive my delayed response. But what I would like to do is, you know, we are talking about the imperative of EDI and what I wanted to talk about is about the view of EDI from the perspective of Chicago.

(Technical difficulties) -- which was founded with EDI in our DNA --

(Technical difficulties)

But also bring people into the organization. And in that context, I wanted to at least share some key statistics about our organization as well as how some of

the constructs of who we are, just by citing some statistics. So, for example, when we were formed, the maestro followed our founder, African-American gentleman. So she represents EDI -- in turn when our CEO retired, it was Blake Anthony Johnson has come on board -- he brings true skills to our orchestra. But -- (Technical difficulties) -- in that we have more than 35 percent of our orchestra staff, musicians of color over 45 percent of those, and our audience -- (Technical difficulties) -- 37 (reading statistics),

So we have embraced EDI as part of who we are since our inception. And that plays out in our fundraising activities as well as everything else we do. I don't know where exactly the programming left off in part because I got kicked out so much, but if there are other relevant topics that you would like me to share and speak to, I'm sorry that I wasn't following the chain because I have everything prepared. I can talk about.

>> ANGELIQUE GRANT: Perfectly fine, thank you.

>> SHARON HATCHETT: Yeah. If I can cite some examples of how EDI and the business proposition play well with each other, one such example because we pride ourselves on doing performances because our mission statement is focused on EDI, and we value having diversity, equity, and inclusion playing out and bringing together people of diverse backgrounds under the auspices of compelling music.

We make sure our music performances are fresh, innovative. We use creative instruments. We have included cell phones, for example, in our performances, tap dance, any variety of musical scores and ways of making ourselves interesting to draw in diverse audiences. Our fundraising, for example, one of our signature events is our Martin Luther King performance because not only



does it honor our mission and vision of EDI as an important construct, but we precede it with a reception that's focused on bringing together corporate leaders, civic leaders, and others to celebrate diversity followed by a concert is that not only honors Dr. King, but we have a broad programming that varies as we honor Dr. King.

But we always end with holding hands across the whole orchestra in the orchestra hall singing "We Shall Overcome." And part of this is bringing together people in unit with a focus on valuing, equity, diversity, and inclusion, but also reminding people that the value of equity, diversity and inclusion brings to our various organizational cultures because it's not only a moral imperative, but a business imperative for us to have this type of a model.

And fundraising has obviously been key to what we do. And our organization including as volunteers has been doing this since our inception which was relevant even to the forming of our organization. And so we have always felt that innovative programming and everything else we do requires that kind of financial support because we want to bring forward sustainable business model with commitments to EDI and the mission and vision of our orchestra.

>> ANGELIQUE GRANT: Got it. Well, you are definitely looking at it from are a different perspective, right.

>> SHARON HATCHETT: Yes.

>> ANGELIQUE GRANT: There are some organizations, we started this and Ron had provided the definition of diversity in all senses, right. So you have some organizations that are homogenous, on the other side and that's a perfect example as to how you would look at it and view it as a business imperative from your lens. So I appreciate that. Thank you.

So Lee, Lee Bynum who is the viewpoint of Impact at the Minnesota Opera, same question for you. Where are the engagement and fundraising imperatives for EDI in your organization, given your mission?

>> LEE BYNUM: Good afternoon, everyone. I apologize for my tardiness. I feel like every time I'm introduced to a new platform, it exposes the fact that a musician and not a technologist. Danielle Clarke was really helpful in getting me sorted. Thank you to her.

I have been only been at Minnesota Opera for three months. So I will reframe it with my previous experience where I was on the program staff at the Mellon Foundation for ten years, primarily making grants around equity and diversity in the arts and higher education.

Like Ed, I am of the opinion that the future of the medium is tied completely to mastering a new set of demographic realities. Therefore, it's critical to demonstrate to funders that you are engaged actively and intentionally in a process of evaluating your own equity and inclusion efforts. The field at large is considered to be lacking in this regard, right. Accordingly, there's a general expectation of performing arts organizations are learning to speak about their work vis-à-vis diversity goals.

So I will share three points with you that you should consider because your program officers probably are already. First you should represent honestly where you are in your EDI journey. Funders are investing in measurable impact, so you have to be clear from where you are starting and why that is. Second, be aware that funders may be interested in the ways that EDI shows up in both your internal and your external practices as well as how it positions you relative to the rest of the field.

And third, the greatest resource at your disposal is the art itself E but are not actually events in the organizational work product was the music. So a little bit later in the session I can talk about some of what we have done at Minnesota and also what I've done with the dream unfinished orchestra here in New York City which is an activist orchestra where we have been pretty successful in our philanthropic efforts.

And I think a large part of it is how we have managed to integrate EDI principles into the core mission. And then subsequently be able to demonstrate them throughout the work that we are doing.

>> ANGELIQUE GRANT: Thank you. We will look forward to hearing more of that as well.

>> RON SCHILLER: Great. So we will move back to the slide deck. So what we were underscoring here is the importance in the recruitment of our staff members and our volunteers in talking about EDI as central to the fulfillment of our missions, and that it is an imperative in stakeholder engagement and fundraising. We heard a few different examples of how that plays out.

But being involved in our search work, we hear from diverse candidates all the time are they interested in me just being in the search pool just because of the color of my skin or my gender or my sexual orientation, or am I going -- is my life experience, is my professional experience, is my diversity going to be valued and valuable to the organization?

And if you communicate that you want diversity and then in the interviewing process all you can talk about is again the moral imperative, then candidates who bring that diversity have probably had the experience before of entering an organization because of, again, the diversity that they have, but not

really having that be tied to their chance for success as a contributor to the organization and ultimately the organization's success.

We have heard story after story not just from staff members, but also from board members who have said I was recruited. I was excited to join the board. I was the only one lesbian, the only one African-American, or the only one older person or younger person on the whatever it might be, but then my voice wasn't heard. Ed brought his example forward which is worth reflecting on.

It's not going to take just the one or two or three, but really figuring out how we are going to tie diversity, equity, and inclusion to the mission and to our business imperatives to our engagement and fundraising imperatives and then communicate honestly and openly and be, in fact, authentic about including that diversity in our work and in our planning, and to be willing to fail forward.

We hear constantly from candidates for board positions and for staff positions we don't expect every organization to be at Level 4. Right. We don't even expect every organization to necessarily be at Level 2 or Level 3. But we want organizations to know where they are on that journey and then to tell us and communicate with us.

And if we can help advance the organization on that journey, we want to be able to do that because it's going to be meaningful to us and it's going to be impactful for the organization as a whole. So those are the key takeaways we wanted to leave you with. Start with the why, but also be transparent and honest about why you are inviting this particular board member to be on the team or why you are inviting this particular staff member to be on the team.

Let's move to the next slide. So I am going to turn it over to Angelique.

>> ANGELIQUE GRANT: Thank you. So over the years as a major principle gift fundraising have had the opportunity to work domestically and internationally with a vast array of volunteers and donors in addition to traditional fundraising approach if you may, right. I spent years engaging from various communities whether it's the Jewish community, Latin American, Caribbean, LGBTQ-plus, Asian and have also spent time in Germany with the Fulbright program in institutional advancement as well.

This conversation is going to come from a conversation of not only the research, but our lived experiences, our professional experiences in working with diverse groups. So when we talk about inclusive engagement in fundraising or let's say inclusive philanthropy, this means we are authentically welcoming and engaging all individuals to participate in gifting through all giving vehicles in all giving channels, right.

Bringing in new audiences and populations into your donor pipe line. So we are going to touch on what are research and donors telling us? And then also developing inclusive strategies. Next slide.

So let's talk about the research. Right. By 2060, more than 50 percent of all Americans will belong to a minority group. There will be no one majority group in the U.S., and even today one in every three Americans is a minority. So at the end of the day we have changed, and we are changing every day.

Also in the research, according to -- Blacks are almost twice as likely and Hispanics more than twice as likely to give, and the report continues to share that they are not solicited as frequently as other groups. Right. And then lastly, when we take a look at the research, this is the first moment in history where we

have had four generations of active donors. And knowing that, how are you reinventing your engagement and building meaningful relationships with perspective donors at the end of the day?

So our diverse potential donors, they have been there all along, right. They've changed. They are continuing to change in general. But a lot of them are not being included in your organization's philanthropic strategy. Why? Because when we think about philanthropy, if we were thinking of an philanthropist, if we were to say let's go through an exercise, we would probably come up with older white male as a profile.

We would think of the Fords, the Rockefeller, the Gate Foundation. There's this assumption that Blacks don't give. I will just give one example. And again, we know we are talking about gender. We know we are talking different communities and ethnicities and identities. Right. But for this example, there's this assumption Blacks, they don't give.

Or they give to the church. When in actuality, they give through the church because churches are committed to their communities and they show a different type of impact in community support. That's where their trust lies. Not to mention there are numeral Russ civic organizations and sororities and fraternities that have been around since the early 1900s, right.

Another example is the Alpha Epsilon Boule. Been around since 1904. 112 chapters across the country. Members of that group are seen as wealthy individuals. There's about 10,000. So 1904, these communities are emerging. They don't exist. Well, they actually do exist. Right.

And they are not emerging, according to the research Indiana University School of Philanthropy, personal values and interests really shape donor

preferences. And this shapes where donors may choose to give. Diverse donors want to be more engaged with their giving and also participate in volunteering along with their giving, right.

Some are influenced by identity-based philanthropy, but not all. It's not a one-size-fit-all. That's not what we are sharing, right. And many like to fund areas that are linked to their lived experiences, including their access to success and/or influence. And then also providing that to others as well in their community.

It's really about culture, not color, right. A person or the color of a person's skin is not a significant predictor of engagement or donor interest, nor is age, nor is education or how long they've lived in this country. All communities have a culture of giving and what does drive how much that donor gives, right, is the person's connection to the organization.

And for numerous diverse stakeholders, they don't feel connected to your organization, whether it's a troubling history or the images you may use in terms of your marketing and then communication or to be quite frank you haven't contacted them. You haven't made the attempt to engage them within your organizations. So also for diverse stakeholders, impact is critical. Diverse donors have an interest in observing their impact, not only because and for one everyone expects that, right for the sake of accountability, right. But is there a great deal of appreciation for in general let's say research or programs, right.

However, we have to go beyond the appreciation and the impact of research and programs, right. How will this knowledge or how will this program contribute, benefit, influence society, culture, in our communities? So it's not the mere fact that you are building this program or that you are conducting research or whatever. But how is it impacting the Jewish community? How is it impacting the

LGBTQ+ community? That's the difference between awareness and actually the action and connecting the dots from there.

So as an organization, you have to ask yourself, are you connecting the dots from that respect? Treating donors as partners versus transactionally. And are you focused on the impact versus just being affiliated with your organization as a member or involved in a membership program? Next slide.

Inclusive strategies. Let's talk adaptations, changing the way we think about our work, the way we assess potential donors, and then make that shift towards implementing new practices. Because it's behavior change is what we are trying to accomplish at this point. Many programs rely on prospect research, public data to gauge whether someone is a prospect or not, wealth screenings.

And what we can see is very limiting. Those of us who have been in the philanthropic world, we also know that rich looks different than wealth, right, if you have to look at it from a visual standpoint, right. And you also have to take a look at this sort of nontraditional means in which you are assessing someone's gift capacity, right.

Changing the way we see things. We've also seen organizations come up with what we, you know, have gauged as instead of asking prospective donors what do you care about, why do you care about classical music, why do you want to be involved? Some organizations are just trying to share what they think is important to the donor.

So changing that whole paradigm, changing that whole cultivation strategy and approach to one where you are taking that extra step to learn about diverse communities, learning about the donors, deepening the engagement, right, instead of working on something that may be logical because we have a campaign



and this is our priority. Well, that may be different.

Ask specific questions, right. Where do you want to give? Right. What are your -- what do you want to accomplish with your philanthropy? How would you like to be engaged as a volunteer and/or donor? How might we engage more donors in your community? Because this is what we believe in in our values, our mission, our goals.

So seeking the voice of your donors and diverse stakeholders become really critical in your success given the transformation that you have seen not only in society and our communities, but in philanthropy and nonprofit organizations in themselves. I say that to say three things. These are not emerging groups. They have been around for years.

You have to build trust. It's not about inviting diverse groups to your table. You have to earn the opportunity to become a part of their giving. So building trust, approaching it from very authentically, and authentic engagement and involvement and sharing your impact, right. And then thirdly, these are not transactional gifts. We can't go to organizations with shallow solicitation because we are in need. We know you exist and we have this need.

I do recognize some people may say oh, we have tried that and that didn't work, so where else do we go? That's a transactional approach. Be thoughtful. Be strategic. As you seek to build relationships with various organizations, and do that just as you would with other nondiverse organizations and donors. Next slide.

>> RON SCHILLER: So before I worked with Angelique on the book on "Diversity, Equity, and Inclusion in Advancement," I had done a lot of research and wrote two books on the subject of principal gifts, transformative gifts, the largest gifts

people make and why they make them to certain organizations. And this is all across the nonprofit sector and mostly in the United States, but including some global perspectives as well.

And what I found in that work which resonated with me in terms of my own fundraising work over 30 years is that people gave their largest gifts to organizations where they basically felt included. There's a high correlation between the largest gifts given and board membership, and that is because board members feel they talk about the organization in the first person. They feel included.

They know what the goals are of the organization. They in fact are involved in helping shape the goals of the organization. And so as I thought about this new book and the importance of including all donors, reflected on this concept of meeting donors as they prefer, that in effective principal gift fundraising, you start by listening.

You start by figuring out by assuming that someone is philanthropic and then by asking the question what are you trying to accomplish with your philanthropy? And how might I help? How might my organization help? And to realize that most principal gift donors will not talk about giving to an orchestra. They will talk about giving through an orchestra to the community or to young people or to schools or to whatever it is the impact that they are trying to have on something that they love.

The orchestra is the right partner to do something that matters to them. And same in higher education, same in healthcare. These donors who make the largest gifts, they don't see themselves as outside the organization giving to the organization. They see themselves as part of the organization combining their resources with the rest of the resources of the organization to do something

that's important to them for whatever community is being served.

So I think we see that the same -- that the answer, the key that we are looking for here in how to engage more diverse constituents is a very similar key. As Angelique talked about, there's a wonderful article in *The Washington Post* just from this past week that also underscores this idea that donors of color have been there all along, and that we may have written them off with this idea that, well, they give most of their money to the church.

And as Angelique pointed out and this article points out beautifully, the church has been the trusted --  
(Technical difficulties) -- the orchestra might be the trusted partner for having impact on the community just as the educational institution might be the trusted partner or the healthcare institution might be the trusted partner for doing something that is important to me as a donor

So it all starts with who is this donor? What makes them tick? What in their family, what in their faith, what in their upbringing, what in the experiences they have had personally and professionally have motivated them to want to give? How will we tap into that? And then create a partnership where they see our organization as one of the best partners in having impact that they want to have?

And transaction fundraising which is what most of us engage in is, we have a need. Let's figure out how we are going to convince people that they should give us money so that we can meet that need. That is much more transactional. And that kind of one-size-fit-all fundraising I would suggest has never worked and it is especially not going to work going forward as we deal with a more and more diverse community of potential volunteers and potential donors

But rather if you think about the experience of your most engaged donors,

your most engaged board members, they are there not because they have to give away \$100,000 and they are trying to figure out how to do it. They are there because they love the organization. They care about its impact. They care about its mission. And they want to be part of it

The only way we learn what people want to be part of is if we start by asking. One of the most important findings of the principal gift book and we've also seen it in our work in DE&I is when we ask donors has anyone ever asked you what you are trying to accomplish with your philanthropy and why?

That more than 90 percent of donors will answer that question that no, no one has ever asked them that question. No development officer, no president, no board member has ever started with who are you? Why are you giving? Why are you giving your time? Why are you giving your treasure? And what motivates that and how might we as an organization partner with you to help with you that?

We start and they report the donors report that the start of the conversation is what would you like to do for the symphony? Right. Or you know our strategic plans; what would you like to contribute to? I would suggest and Angelique would suggest let's start much earlier, say who are you? Why do you want to be involved? Why do you want to give? What difference do you want to make in this community? And how might we be a great partner to do that?

This is going to require us to take so many best practices or things that we call best practices in our engagement, our board-building, our fundraising work, and reexamine them and say are those assumptions about who is going to be a good board member, who is going to be a great donor, et cetera, are they the right assumptions in the cultivation and the solicitation process? Or, in fact, given what we know about how different communities approach their giving, are there better

practices that we could develop in advancement?

Let's move on to the next slide. So the key takeaway here when it comes to identifying and engaging all stakeholders and donors that we want to leave you with is change and changing demographics require new strategies for prospective volunteer donor identification. These potential volunteers and donors have been there. We've not been engaging with them.

And our constituencies will get yet more diverse, and our old practices that were built in fundraising in particular for prototypical donor in the past, some of them will still work; many of them need to be reexamined. And that a more diverse donor population is going to require those practices that start with diverse donor motivations and objectives, and then combine those with our objectives to have impact on society.

We will go to the next slide. So just a summary of what we talked about today, one, knowledge is not enough. There's a lot of awareness activity going on. Thank goodness people are doing more research, writing more articles, writing more books, reading more books, having more discussions at the board level, at the staff level among volunteers, all of that is critically important.

But awareness is not going to change behavior. It's the start. And then we need to not just jump to activities, but let's create a Black council or let's create a gay and lesbian group, whatever it might be, not just jump to activities, but start with a really careful assessment with diverse voices internal to our organizations and also among our stakeholders and those we would like to involve from our community in the organization.

And to ask them, to assess how do they view the organization? Do they see the organization as something where they would belong? And if not, would

they like to and how would we move toward that? We have to be ready to hear some maybe hard things. We have to be ready to change some habits and behaviors. Go through that assessment. Set as operational goals. They don't have to be change the world tomorrow, but they can be move from stage II to stage III recruiting volunteers. Or in the way we identify prospective donors and so on and so forth.

And then establish sustainable action rather than just activity that is not really going to lead to sustained change. Number two, assessment of EDI maturity provides a basis for the setting of measurable goals and frankly it helps organizations break this overwhelming, you know, challenge down into very specific measurable goals, and be sure to include diverse stakeholders in that process.

Number three, effective recruitment and retention requires articulating EDI as more than a moral imperative. It's certainly a moral imperative, but it's also an engagement and fundraising imperative. If we don't do this, we will fall behind. When we talk about gender and our colleague Kathleen wrote a wonderful book called Gender Matters that is a lifetime of her work on women's philanthropy, she points out that in today's society, 73 percent of giving decisions are made by women.

Women are making the majority of philanthropic decisions in this country, and yet we haven't adjusted our board recruiting, even some of our communication with donors, we often fail and start with the man rather than starting with the woman or starting with the couple.

And so we are in these old habits and we have got to break out of those habits recognizing new realities of giving and giving behavior. And then communicate honestly about where we are because if we want people to join us and help change our perspective and remove our blind spots, we have to tell them that

we have those blind spots and that's why we want them to join our team.

Number four, changed and changing demographics require new strategies for prospective volunteer and donor identification. And number five, a more diverse donor population requires better practices. We have to reexamine everything that we do in light of a different constituency that we are trying to engage. Let's move to the next.

So as we were preparing for this, we were encouraged to offer just a few thoughts on what can I do as an orchestra volunteer, orchestra executive, fundraising leader, whatever your role is, what can I do starting today? We just offer a few ideas here. Ask staff and volunteers for candid feedback on where your organization is on that DEI maturity model.

Use the maturity model or create your own maturity model, but think about moving from just reactive and episodic to much more sustained integration of EDI looking at all of our activities with an EDI lens. Define engagement and fundraising imperatives for EDI. Okay. Not just be ready to answer the question in every search and every board engagement, what difference is it going to make if we do better in EDI for our mission fulfillment?

And have everybody in the organization prepared to answer that question. Otherwise it's just the right thing to do is not going to cut it. It's not going to entice somebody who could bring that diversity to want to join the organization and want to contribute and feel they are going to be valued and valuable. Identify perspectives we are missing on our staff and on our volunteer boards such that we are unable to identify blind spots

That is going to be a different answer for every orchestra in the country. In some places it's going to be we don't have enough younger people. In some

places it's going to be we don't have enough older people or women or gay and lesbian voices or enough people of color. And, you know, within people of color many different voices that we need to have at the table.

But what perspectives are you missing and be intentional about your recruitment and be transparent about your goals so that people who bring that diversity will know it's important to the fulfillment of mission. And finally which of our practices and engagement and fundraising need to be reexamined to assess whether better practices informed by our awareness assessment of EDI are useful to us? Those are a few things we offer that people can start to tackle, one, or two or three or four of them, even today or tomorrow.

And now we want to open it up to your questions, additional comments by our panelists. But any questions that you have? So use the Q&A. I think David is going to help us if there are questions that are already out there. David, can you bring some of those to the panel? And Ed and Lee and Sharon, if you are on, if you could rejoin us, we want you to be able to address these questions as well. David?

>> DAVID STYERS: Great, thank you so much, Angelique and Ron for that wonderful presentation and also to our panelists for being with us today. Three really great questions have already come in and they are also interrelated but I will start with the first one. And they go sort of from the micro to the macro. So the first one is, how can a nonsenior staff person convince their director of development that EDI is a fundraising imperative when they don't see EDI as, quote, their job?

>> RON SCHILLER: So they've heard a lot from me and from Angelique. Lee or Ed, would you like to field that question?

>> ED YIM: You know, I think it's all in the research and there is a real body of work out there, statements by foundation leaders talking about this is an



imperative and the lens through which they are looking at institutional grants.

Certainly the City of New York and I'm sure many other municipal funding bodies have placed an emphasis on EDI as a filter through which they are going to be looking at who they are going to support.

But also, you know, I posted in the chat there is increasingly rich information about individual donors in Black and other people of color communities and their philanthropic potential for all sorts of not-for-profit organizations and how we are not really reaching them.

So I think if you as a more junior staff person want to make a case, I would say the whole theme of this conversation today about having the facts and figures at your fingertips and presenting them in a very tactical way as opposed to as a moral imperative which I agree with Ron, it is, but the color of change is green.

>> RON SCHILLER: Great. Just quickly answering Susan's question about DEI and EDI, the League of American Orchestras, all of the discussions around EDI have used EDI. It's the same as DEI. It's the same words, but at Aspen Leadership Group and including the book we wrote, we talk about DEI and other organizations talking about IDEA and there's also belonging.

So it's really just a way of saying the same thing. Lee, did you want to add to that answer or should we take another question?

>> LEE BYNUM: We can take another question, but I will agree with both you and Ed. I have to arm yourself with data. And you can really do a lot of the work by going to the websites of the funders themselves. There are very few national funders or even regional funders, corporate and social responsibility groups that don't clearly articulate a lot of expectations around seeing the EDI firmly within both the proposals and also the organizational structures.

And I think that that can really be important leverage because I think in this economy, it's going to be really, really hard to attract the philanthropic dollars if you can't demonstrate where those values are.

>> RON SCHILLER: We also have to recognize that our databases and wealth screenings and wealth engines and so on, all of those things have been built with the assumption, some assumptions from the past. They have been built looking at an individual person's wealth and an individual person's giving behaviors. And they do not take into account the giving behaviors of groups, and the influence.

And so when you are dealing with women, there's now a lot of good research out there and there's more and more research on communities of color and the importance of influence and networks on giving. And the total amount that can be given when you have a group that is invested in making that happen can be much more than any individual can give. And yet you might miss rating that potential board member higher because of their personal individual wealth that is found in a wealth screen.

>> ANGELIQUE GRANT: One of the things Lee earlier you made points about things you wanted to share from your days at Mellon, that would be great to hear. Someone asked. It was on my list, too.

>> LEE BYNUM: Thank you for that. And actually, I would love to just approach this by pulling a thread from something that you said, Angelique, a little earlier, highlighting the fact that donors of color like to observe the impact made by their dollars and then share their approach to the external engagement strategies that I have used at Minnesota Opera and the Dream Unfinished.

I found this is an effective way to demonstrate the imperative around EDI as well as recruiting and retaining stakeholders of color. And then at the end I

will leave you with a few orienting questions that can be of assistance if you find that you are at an organization that's still at Level 1 or two of the DEI maturity model.

Gauge efforts flourish when three things are present. Identification and participation of the right matrix of decision-makers for your organization, that's actually something a lot of funders do look for. And an agreed-upon working definition of who constitutes community. The community that you want to reach.

Once these things are in place, I would say there are five general steps that any organization can take. First you have to make an assessment of the needs of the community. In order to do this, you have to be specific about that definition and precise who you are identifying that you should be listening to. In these conversations, I would encourage you to acknowledge consistently the painful history of intentional discrimination within classical music.

It's a critical part of the relationship-building. Two, assess the resources of your organization and not only the material ones, but also consider the knowledge, the relationships and the reputation as things that you can share. And then identify actionable areas of common interests. No one is expecting any orchestra to solve your city's food insecurity crisis, but there is a lot that an established organization can do in the way of amplifying the voices of grassroots organizations that can.

And this again is something that volunteers and donors of color will be looking for in their own efforts to make an impact. Three, with your mission as a guide, develop some new partners, communication strategies and programs that are informed by these articulated community needs. Four, every program and initiative should have targets and these goals should be quantifiably measurable.

Having spent a long time on a program staff, the thing that we are

trying to do is identify reasons not to fund you realistically. And if things are not quantifiable, that makes their jobs a lot harder. So that's a thing that I consistently encourage. It's also just difficult to communicate concretely about what your progress is with stakeholders if there isn't at least some numeric data.

And five, be prepared for a continuous process of examining internal practices for values, alignment and consistency. And there's a postscript, too. Don't skip any of these steps. I think all of them are really important in being able to communicate what it is that you are doing to folks.

So there are a couple of questions I would encourage you to think about as well as with the stakeholders. These are things that I have heard consistently in my development work specifically from donors and volunteers of color. What efforts are you making to diversify your orchestra? Communities are going to be differently invested in a diverse orchestra than a diverse board and that's just the reality of how people see the creation of the art.

Second, what efforts are you making to engage the community in a sustained substantive way that really does reflect an understanding of that community? Third, where are you investing in inclusion, diversity, equity, and access in your organization? It really does need to be something people can observe. You have to figure out how to communicate that piece out.

And then lastly and this is kind of a multipart question for you, how do you define community for the purposes of engagement? Have you identified the strategic targets and have you learned about those targets? Right. How are you interfacing with them currently and how do you show up to them? And I think if you are at an organization that is seen as being a part of the elite, that's part of what you actually have to counteract in every single conversation, the idea that this is not a

space for people who look like me.

And I think even for high net-worth individuals or individuals who are very committed to giving to the arts, these are pieces they are looking for and they are going to be as interested in giving to organizations that can demonstrate this as they are to others that are may be known for their excellence. I think this is a slightly different conversation when you are thinking about individuals of color.

>> RON SCHILLER: Thank you. Thank you very much, Lee. David?

>> DAVID STYERS: Yes. Thank you, Lee. Another question that's come in. Our orchestra has done very little since it release the its Black Lives Matter statement in June. How do we have a constructive conversation that more needs to be done if we are going to put out statements like these?

>> RON SCHILLER: Sharon or Ed?

>> ED YIM: Yeah, that's an interesting dynamic. My personal opinion is that there were a lot of orchestra and arts organizations that put out Black Lives Matter messages who didn't earn the right to do that. And so it sounds a little bit like your orchestra put it out to jump on the bandwagon of wokeness, and hadn't really done the work to earn the right to do that.

>> Yes.

>> ED YIM: I personally was of the mind that if you didn't earn it, be quiet. It's time to be quiet and listen and not jump on the bandwagon. So in terms of moving off that place, I think everything that Ron and Angelique have said about, you know, having the hard conversations, doing the audit, doing the assessment, and then creating an actionable measurable plan that is going to earn you the right to be in solidarity with different communities of color is where you need to go.

So I would go back to the slides that I'm sure will be made available

to you about how to get started with all of that.

>> RON SCHILLER: And making sure that those voices are included in that assessment and audit and plan. That's part of earning that, right.

>> ED YIM: Absolutely.

>> RON SCHILLER: Sharon?

>> SHARON HATCHETT: I would agree with that because one of the biggest concerns for orchestra and any organization is that some people want to put proclamations out there. But they are not really sincere or committed to what EDI truly stands for unless they are walking the talk and prepared to, and roll out actionable programs and provide inclusive and diverse opportunities for people, you are going to also alienate people of color because we are not that -- we are aware of people trying to ride coattails who don't really want to add value to the conversation and make a difference.

So I think you can hurt yourself by doing that unless you are walking the talk and taking the actionable steps that have been presented today in this presentation in the discussions.

>> RON SCHILLER: Okay. David?

>> DAVID STYERS: So another question. Our fundraising focuses on galas and paying attention to the biggest donors which emphasizes sort of exclusivity, the opposite of this EDI conversation. How do we improve inclusivity with this fundraising model or how could the model be changed?

>> RON SCHILLER: Great question.

>> SHARON HATCHETT: Yes, we do galas. But because people of color are prepared to stand behind and be very supportive of organizations they believe in and whose values and what they stand for is aligned with that, our

orchestra for example has had significant contributions from the African-American community including to get us launched in the first place.

And so if you do targeted programming or you reconstruct your priorities to target diverse orchestra, take advantage of the value of their voices to what can be an effective way of fundraising that does not come across as elitist, you will have the better chance of getting the types of sustainable relationships that will be sustainable to you for the long run.

But you have to again not make people feel like you are not committed. And if you are only dealing with the high-end donors, if there's a way for you to be inclusive and reach out and recognize you are also in that realm, that's another important consideration. You can't just assume that anyone who is elitist and -- I think that's been proven to the contrary.

And be inclusive because there are a lot of people who understand about EDI who stand behind these societal changes. So we all need to be a part of this process together.

>> RON SCHILLER: Great. And I would just add it's another opportunity to include different perspectives and different voices. And don't assume the gala construct itself is not good or bad. It is a way of getting people together. An annual fund appeal is not good or bad inherently. But what you say in it or how you put the gala together can be more effective or less effective.

And the more perspective you get in putting it together, the more it will connect with the people it's intended to celebrate and to serve. David?

>> ED YIM: You know, Ron, you have mentioned a couple of times and you and I offline have talked a few times about getting the right people in the room to connect with these communities. I mean, if you are a homogenous organization

trying to connect with a diverse community, you have got work to do.

I wonder, Sharon is part of an organization that reflects the community that it's trying to reach. So she and the symphony are already kind of in that space that we all are aspiring to. But for those of us on this call who might have organizations that are several steps behind, I just want to take a moment to talk about some things that you and I have talked about, about recruitment of staff and recruitment of board members.

And I think we need to start thinking about changing the paradigm of what we are looking for when we are looking for staff members and board problems. So with staff, I will start by saying in the orchestra field, I feel except at the very entry-level experiences, we are worried about whether they have the experience, whether they have played professionally or know the repertoire or whether they have been a professional fundraiser before. And I would say that one place to start is to say not what experience do I want in this position, what are the skills and what are the human qualities that I want in this position?

So if you wish looking for a fundraiser for example for your organization and you want a diverse pool of qualified applicants, if you are looking for someone who has, you know, done an annual fund before, you know, done major gifts, et cetera, you are going to limit your potential to reach a lot of people. If you start thinking about, are they good with people, do they think strategically, do they know how to follow through and do the detailed work, then you can find more people and a more diverse group of people with those qualifications than if you say I need someone who has three to five years experience fundraising.

So that's on the staff level just one very simple thing. If we start thinking about skills and human qualities that would make them succeed at the job,



then you are going to open up the possibilities to the people who are going to be qualified for the job rather than just basing it on experience.

For the board, I would go out on a limb and say I think the whole idea of a minimum give is really limiting orchestra, because the people who are on the boards of orchestra, if the minimum give of a major orchestra, say, is \$50,000 or whatever, then they are going to feel bad if someone is there and not giving \$50,000, right, in the interest of having more diverse voices around the table.

And you are limiting yourself who can be on the board around the table. What skills do you need? What community connections do you need? What communities are you trying to reach? And in terms of the financial model, I think we should start moving towards we are going to be one of your top philanthropic priorities and we will have a discussion with you about the level of giving that is going to, you know, stretch you a little bit and that is within your means, but that is going to make it clear that you are going to give to this organization to your capacity.

And if everyone is doing that, then that's a different way than thinking about the financial commitment to the organization than just setting a number.

>> RON SCHILLER: And by the way, after 35 years in fundraising, I will say without any questions and stand behind it, that minimum expectations always lower sights and always lower the total amount raised, always.

>> ED YIM: It acts as a floor -- it acts as a ceiling rather than as a floor for giving. I mean, if thank you set a minimum give of \$50,000, one may be capable of giving \$150,000. But it's too easy to say I have given my minimum.

>> ANGELIQUE GRANT: You need to blow this whole model up. You need advisors and ambassadors and askers. You can open the door to additional

communities if you have people who are serve in that ambassador capacity and opening up doors and communities that you are not already in. As it relates to the staff, you talked about competencies in this job description we are so stuck on. It's about cultural competencies, not cultural fit.

Look at your team. Understand where the gaps exist with your team and hire to your team, not necessarily to a job description and itself that changes anyway most of the people aren't even working to their job description. You have to think beyond that. And that's a part of the systemic change. That's that short- and long-term piece. Let's say you are working towards hiring a diverse candidate pool, there's a difference between having a diverse candidate pool and wanting to hire a diverse candidate.

You have to be ready for it. And when you go through the process and ask everyone how are they bringing these different audiences and diverse groups to the table? Let that be a requirement for the interviewing process. And if you have a rubric or some sort of rating evaluation, weigh that in the process as well.

But you can't go about doing the same things and expecting change at the end of the day.

>> RON SCHILLER: I'm just with two minutes left, I think it's my responsibility to turn it back to David. Did you want to make closing comments or have one more question?

>> DAVID STYERS: Why don't each of you, if there's one more thing you would like to say that you haven't had a chance to say on this webinar today, feel free to share any final thoughts that you've.

>> RON SCHILLER: Terrific, Sharon? Any closing comment?

>> SHARON HATCHETT: Well, yes. I think very good opportunity for

those who joined us today to understand the value of EDI and the experience is on the other end of this because we have been doing it for 33 years. But I think all the recommendation also out there and continue to follow them. We encourage you to follow them and take them to heart.

EDI is an incredible and much-needed journey.

>> RON SCHILLER: Thank you, Sharon. Lee?

>> LEE BYNUM: So in response to the question, what can I do starting today, I would encourage all of you to begin a running list of the practical and conceptual barriers that inhibit new stakeholders from engaging with your organization. You can't really address problems that you haven't identified, and I think it can go a long way in helping you to understand how you can bring new folks into what you are doing.

>> RON SCHILLER: Great. And Ed?

>> ED YIM: I am going to bring up something completely different or a new thread, actually, which is that I have been thinking a lot about this. Is that the organization that I'm currently at, for example, New York Public Radio, we are very good at recruiting entry-level staff members of color. And we are not very good at retaining and promoting them.

And I know that organizations, we have many small orchestra on this call. So in terms of retaining staff, if there's no place for them to move up, then we have got a problem. We are saying come join the orchestra field and what are we doing to actually elevate them and to train them up to become leaders of the future? Right.

So one thing is that you may not be able to retain them, but consider it a service to the field. If you are attracting someone to the orchestra field and

giving them some experience and they go onto work for a different orchestra, that's a part of the cycle of life and I think we should all be committed to that as a field that we need a larger body of BIPOC leaders for the future. And so we should share the people that we find and that we train up.

And then secondly, I have noticed in the theater community that many white leaders of theaters are stepping aside and making room for the next generation of leaders who will better represent the communities that they serve. And I think that, you know, I turn to what Darren Walker at the Ford Foundation said which is good intentions are great, but what power are you willing to give up as well?

So I would just ask that everyone on this call start thinking about those things.

>> RON SCHILLER: And Angelique?

>> ANGELIQUE GRANT: For the sake of time, I'm just going to say thank you for having all of us. It's been a great conversation. And if there are any follow-up questions for any of us, I'm sure we are more than open to answering them.

>> RON SCHILLER: And I will say the same thing. Feel free to contact me or Angelique. At Aspen Leadership Group or Ron Schiller at Aspen Leadership Group.com. I'm sure any of my panelists here would be open to continuing this conversation. We are all really committed to strengthening equity and diversity and inclusion in the sector.

I will just leave you with the following thought. Anybody who is involved in fundraising and board-building and so on, advanced work, if you just perhaps think of your role as facilitator of belonging and facilitator of generosity, rather than as solicitor, you may just turn the dial a little bit and think I need that

person's perspective before I start to make assumptions about they should do or what I want them to do.

If I start with the idea that they might want to belong and I start with the idea that they might want to be generous and my job is to help facilitate that, I have no choice but to start with who they are and what they might want to accomplish. And I'm probably going to get much further down this journey as a result. Back to you, David.

>> DAVID STYERS: Great, thank you so much, Angelique and Ron for your research and the publication of your book. Thank you, Ed, Lee, and Sharon for sharing your expertise and perspectives during this very interesting time. You gave us all a lot to ponder and some great tips how to move forward successfully. We again want to thank you for your time and for all of you on this webinar for your time today.

And again, a reminder that everyone who registered will receive an e-mail with the recording, PowerPoint, and the transcript of this webinar very soon. And again once again, appreciate your completing the evaluation form located in the session description. The link has a whole lineup of additional future learning events in 2021 and we approach these offerings based on your feedback.

So please join us for our next webinar in four weeks on Wednesday, January 13th, again at 3:00 p.m. Eastern. We will be looking at a session on coming back stronger using the shutdown to rebuild audience loyalty. And again, we want to thank you for joining us and we wish you all a safe and healthy holiday season. Have a great rest of December.

>> RON SCHILLER: Thanks.

>> SHARON HATCHETT: Thank you so much.

>> RON SCHILLER: Thanks, Sharon. Bye, bye. Happy holidays.

>> SHARON HATCHETT: Thank you.

>> ANGELIQUE GRANT: Happy holidays.