Dissonance & Disconnects: How entry- and mid-level foundation staff see their futures, their institutions and their field

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Executive Summary

In early 2017, Emerging Practitioners in Philanthropy (EPIP) conducted a survey to better understand the workplace experiences of EPIP members and their peers. The survey was intended to build on themes identified through EPIP’s strategic planning process, in which interviewees and partners consistently noted challenges with respect to diversity, equity, inclusion (DEI), and organizational culture and practice. During that planning process (which Christi and Francis helped facilitate), we were surprised that while these themes were so consistent, our findings did not seem to be common knowledge in the field. We sought to bring more data to support philanthropy’s work to fulfill its commitment to DEI.

Through the survey, we asked questions focused on the themes of:

- Diversity, equity, and inclusion;
- Perceptions of leadership, contribution, and belonging;
- Alignment between institutional mission, values, and practices; and
- Participants’ perceptions of their futures at their institutions and in the field.

Overall, the study presents a portrait of early- and mid-career practitioners in the field, highlighting their thoughts, feelings and lived experiences. It also reveals some surprising (and some not-so-surprising) disconnects between organizational aspirations and staff perceptions. Our findings include the following:

**Satisfaction, Leadership, and Advancement**

A strong majority of respondents are proud to work at their institutions and/or in philanthropy. And yet:

1. Only 22 percent of responding practitioners see a future for themselves at their institutions, and only six percent see a clear path to advance from their current positions.

2. Just under half of respondents (48%) feel they have an adequate level of influence in their workplaces.

3. Entry- and mid-level staff were significantly less likely to report feeling seen as leaders, having the autonomy they need to do their jobs, or being able to make meaningful contributions to their organizations’ missions.
Diversity, Equity, and Inclusion

4. Respondents generally rated their institutions low with respect to diversity, equity, and inclusion, with a sizable gap between institutions’ goals and institutional realities.

5. Few respondents (21%) perceive the culture of philanthropy to be inclusive of all backgrounds, and many have found philanthropy to be less than fully inclusive of their own identities.

6. For a number of measures, reports on experiences in the workplace varied by racial identity – sometimes in surprising ways that bear further exploration.

7. Among other differences, LGBTQ-identified respondents feel less of a sense of belonging in their institutions than their non-LGBTQ peers.

8. Grantmaking staff tended to rate numerous DEI-related measures less favorably than non-grantmaking peers.

9. Only 40 percent of respondents believe their institutions are in touch with the needs of the communities they support, and only about one in four (24%) reported that the communities they serve have a voice in decision making.

Outlook on Philanthropy

10. Ultimately, only about half of the survey respondents (51%) perceive philanthropy to be an effective player in social change.

11. Just over half (55%) of respondents see themselves leaving philanthropy within the next five years.

In addition, on over a dozen measures, respondents from foundations with larger staff sizes reported less positive experiences than their peer from foundations with smaller staff sizes. These findings suggest a need for deeper understanding of where foundations’ aspirations to advance a more just and equitable society come into conflict with their internal structures, cultures, and practices, and where existing practices can be strengthened or replaced.

Introduction

In recent years, our country has faced rising tensions across racial, social, and political lines. Virtually every issue in which philanthropy is active – education, environment, climate, LGBTQ rights, immigration, healthcare, and more – has been affected in some way. In this moment, philanthropic practitioners have felt called upon to respond in new ways, and to examine the alignment between their institutions’ practices and their values.

Early- and mid-career practitioners, such as those working at associate and program officer levels in foundations, are poised to help philanthropy navigate this current moment. In addition to their educational backgrounds, substantive knowledge, and professional skills, these practitioners bring great passion, valuable lived experiences, commitment to social justice and equity, and greater diversity than is currently reflected in philanthropic leadership. In short, they are powerful assets to their institutions — if their institutions can meaningfully engage them.

This proposition undergirds EPIP’s recently-released strategic plan, which was facilitated by Christi and Francis. As EPIP went through the planning process, we heard many stories from EPIP members and other stakeholders about how foundation efforts around leading and operating for equity were falling short of their goals — despite good faith efforts from senior leadership. The stories we heard were so consistent that we began to suspect that they were representative of what was happening throughout the field — and yet these stories were rarely mentioned in mainstream philanthropic discourse, perhaps because they put the tellers at personal risk.

We developed and conducted a survey, which we call the Sector Experience Survey, to test that hypothesis. Our goal was to explore the extent to which the stories we’d heard represented common experiences of early- and mid-career practitioners in our field — particularly those who identify as people of color, women, and/or LGBTQ.
Administered in early 2017, the survey captured the perspectives of 188 professionals in the social sector, including staff at foundations, infrastructure groups, consulting agencies, and nonprofits. This report focuses on the perspectives shared from the 114 respondents currently working in foundations.

Core to the survey were 48 items reflecting five dimensions of the workplace experience: contribution and advancement, identity and the workplace, organizational culture, institution in the community, and experience with philanthropy as a field.

We consider this report a contribution to a large and growing body of knowledge on DEI issues in philanthropy, as well as a basis for further dialogue, rather than a definitive accounting of foundation DEI and staff engagement practices. Additionally, there are many good research pieces that our report complements. A few especially relevant pieces are listed in the acknowledgements section.

About the Sample

In total, 188 professionals across the philanthropic sector responded to the survey. Of those 188 professionals, 114 (61%) work in foundations; their experiences are the focus of this report:

Foundation Type. The majority of respondents (55%, n=114) work in private or family foundations. An additional 34 percent reported working in public or community foundations.

Race / Ethnicity. Forty-six percent of respondents self-identify as people of color (n=108). This is greater representation of racial and ethnic diversity than in the field overall, where the number is closer to 26 percent.2

Gender. The vast majority of respondents (87%, n=111) identify as women. In the field more broadly, women comprise 76 percent of full-time staff.

Age. Forty-three percent of responding professionals (n=108) are 30 or younger, compared to 11 percent in the field more broadly. In our sample, an additional 29 percent of respondents are between 31 and 35.

Seniority. A little over half of respondents (54%, n=114) are mid-level staff in their organizations (such as program officers). Thirty-seven percent identified themselves as associate / entry level, and the remaining nine percent are senior level employees.

Geography. The West Coast and East Coast comprise the largest geographic groups, representing 44 percent and 31 percent of the sample respectively (n=112).

LGBTQ-identified. Twenty-one (21%) of respondents are LGBTQ-identified (n=108). Please see Appendix A for greater information about the sample, and Appendix B for more background regarding our methodology more broadly and the strengths and limitations of this approach.

Key Findings

Satisfaction, Leadership, and Advancement

1. Only 22 percent of responding practitioners see a future for themselves at their institutions, and 3 only six percent see a clear path to advance from their current positions.

The vast majority of practitioners are proud to work in their institutions (77%), and nearly three out of every five (58%) reported being satisfied or
very satisfied in their workplaces.

However, when they were asked about their futures, the picture became much murkier. Only one in five respondents (22%) see a future for themselves at their institutions. Even more striking, only six percent of responding practitioners believe they have a clear path to advance from their current position.

In open-ended comments, practitioners often mentioned structural and cultural barriers to advancement in their institutions, such as limited availability of positions to move into, or a tendency for institutions to hire people from outside rather than advance from within.

When asked about their future in philanthropy more broadly, a little over half of respondents (56%) reported seeing a future for themselves in the foundation world.

2. Just under half of respondents (48%) feel they have an adequate level of influence in their workplaces.4

When asked the extent to which they are able to have the influence they want in their workplace, 48 percent of survey respondents said they have the influence they want to a moderate or great extent.

However, those with greater seniority in their institutions report far greater satisfaction with their level of influence. This finding was highly statistically significant.5 Exhibit 1 shows the percentage of respondents at each level who reported having the influence they want to a moderate or great extent.6

EXHIBIT 1. INFLUENCE BY SENIORITY LEVEL

<table>
<thead>
<tr>
<th>Senior</th>
<th>80% (N=10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mid-Level</td>
<td>51% (N=59)</td>
</tr>
<tr>
<td>Associate</td>
<td>36% (N=59)</td>
</tr>
</tbody>
</table>

3 Included in this percentage are practitioners who said ‘Agree’ or ‘Strongly Agree’ in response to a survey item reading ‘I see a future for myself in my institution.’ These represent the top two options on a six-point scale spanning from ‘Strongly Disagree’ to ‘Strongly Agree.’ ‘Slightly Agree’ and ‘Slightly Disagree’ were used in place of a neutral category and were not included in determining the percentages used throughout this report.

4 Included in this percentage are practitioners who said ‘A Moderate Extent’ or ‘A Great Extent’ in response to a survey item reading ‘To what extent have you been able to have the influence you want in your workplace?’ These represent the top two options a four-point scale that included Not At All, Somewhat, A Moderate Extent, and A Great Extent.

5 Every time a comparison is made in this report, the finding is statistically significant at p<.05 or smaller. In this case, the finding was highly statistically significant (p<.001).

6 While throughout this report, exhibits often display the percentage of respondents who rate their experience at or above a certain threshold, statistical testing to compare is based on the broader distribution and mean scores.
In my institution I wish I had more influence, ability, and authority to affect change, mostly the first two. I don’t know that anyone would listen to me as I come from the nonprofit sector and I’m only an assistant. I wish people would listen to my ideas, having come from the community. I have a lot of ideas, suggestions, and knowledge to bring to the table.

**Associate-Level Survey Respondent**

At the same time, ratings of influence also varied by region. Eighty-six percent of respondents in the South reported having the influence they want to a moderate or great extent, while only 35 percent of those on the West Coast said the same, as well as only 29 percent in the Midwest. Exhibit 2 displays the difference in influence by region.

**EXHIBIT 2. INFLUENCE BY REGION**

<table>
<thead>
<tr>
<th>Region</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>SOUTH (N=14)</td>
<td>86%</td>
</tr>
<tr>
<td>EAST COAST (N=33)</td>
<td>58%</td>
</tr>
<tr>
<td>WEST COAST (N=48)</td>
<td>35%</td>
</tr>
<tr>
<td>MIDWEST (N=14)</td>
<td>29%</td>
</tr>
</tbody>
</table>

When respondents wrote about influence, they highlighted factors such as hierarchical organizational structures or power dynamics that impact having the influence they want in their institutions.

As a person from a lower income background, it is extremely difficult to navigate this space. There are a lot power dynamics at play and a huge dominant versus subordinate dynamic between people at different levels of the organization.

**Mid-Level Survey Respondent**

More collaborative leadership across the organization, less hierarchical politics. I’d like hiring practices to start valuing how mission-driven someone is as much, or more so, than status/background prestige.

**Associate-Level Survey Respondent**

3. Lower-ranking staff were significantly less likely to report feeling seen as leaders, having the autonomy they need to do their jobs, or being able to make meaningful contributions to their organizations’ work.

As shown in Exhibit 3 below, the more senior the practitioner, the more likely they were to report being seen as a leader, being able to contribute productively to institutional strategy, having autonomy, and seeing a future for themselves both in their institutions and in philanthropy more broadly. Responses to questions on other issues, including identity, workplace culture, and how institutions work with communities, did not vary significantly by seniority.

**Diversity, Equity, and Inclusion**

4. Respondents generally rated their institutions low with respect to diversity, equity, and inclusion, with a sizable gap between
EXHIBIT 3. POSITIVE CORRELATIONS BETWEEN POSITION SENIORITY IN INSTITUTION HIERARCHY AND AGREEMENT WITH SURVEY ITEMS

(Percent of Practitioners Who Agree or Strongly Agree with Each Statement)

I am seen as a leader in my institution.

- Associate: 10%
- Mid-Level: 41%
- Senior: 100%

I am able to contribute productively to my institution’s strategy, learning, and/or development.

- Associate: 23%
- Mid-Level: 53%
- Senior: 90%

I see a future for myself at my institution.

- Associate: 12%
- Mid-Level: 24%
- Senior: 25%

I have a clear path to advance from my position.

- Associate: 0%
- Mid-Level: 8%
- Senior: 56%

I have autonomy in the work I do.

- Associate: 29%
- Mid-Level: 55%
- Senior: 80%

I see a future for myself in the foundation world.

- Associate: 45%
- Mid-Level: 60%
- Senior: 80%

Strong Correlation

Moderate Correlation

Small Correlation
dissonance and disconnects. Exhibit 4 below highlights the three workplace culture items with greatest agreement and the three with least agreement.

**EXHIBIT 4. INSTITUTIONAL CULTURE**
(Percent of Practitioners Who Agree or Strongly Agree with Each Statement)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agreement</th>
</tr>
</thead>
<tbody>
<tr>
<td>My institution’s work is relevant to what’s happening in the world today.</td>
<td>74%</td>
</tr>
<tr>
<td>My institution’s mission aligns with my own.</td>
<td>58%</td>
</tr>
<tr>
<td>In my institution, we talk openly about equity during the course of our work.</td>
<td>49%</td>
</tr>
<tr>
<td>My institution’s board is a strong ally for equity.</td>
<td>28%</td>
</tr>
<tr>
<td>My institution has an explicit equity lens.</td>
<td>27%</td>
</tr>
<tr>
<td>Leadership at my institution is diverse</td>
<td>26%</td>
</tr>
</tbody>
</table>

In open-ended comments, practitioners spoke about challenges including a disconnect between staff and board or between grantmaking staff and leadership, equity being an outward focus but not translated to internal practices, and a lack of shared understanding about what the practice of equity looks like.

The organization as a whole talks about D&I, but I would bet if you talked to people of color in my organization they would say that a lot of the individual level interaction is pretty tone deaf.

Survey Respondent

One of my biggest challenges (though I do believe in our work and am passionate about it), is that while we say things like “equity” in our grantmaking, I don’t know that we fully embrace those lenses within the institution.

Survey Respondent

5. Few respondents perceive the culture of philanthropy to be inclusive of all backgrounds, and many have found philanthropy to be less than fully inclusive of their own identities.

While practitioners were asked their perspectives on their institutions and philanthropy on the whole, they were also asked questions related to their own identity. Across all respondents, only about one in five (21%) believe that the culture of philanthropy is inclusive of all backgrounds.

Exhibit 5 highlights responses related to practitioner identity in the workplace. In addition, 11 percent of practitioners either agree or strongly agree that they deliberately do not disclose one or more aspects of their identity in their institutions because they are concerned about how it will be perceived. Eight percent reported that they sometimes find it harder...
to get approval, funding, or other resources than another person in their same position would, likely because of one or more of their identities.

**EXHIBIT 5. IDENTITY IN THE WORKPLACE**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I feel a sense of belonging in my institution. (n=113)</td>
<td>51%</td>
</tr>
<tr>
<td>It’s easy to move through my institution as a person with my identities. (n=114)</td>
<td>48%</td>
</tr>
<tr>
<td>I am able to bring all of my identities (e.g., age, gender, race, class, sexual orientation, or other facets of my identity) to work. (n=114)</td>
<td>43%</td>
</tr>
<tr>
<td>I believe my colleagues understand what it takes to maintain a safe workplace for people whose identities are less privileged in society. (n=112)</td>
<td>41%</td>
</tr>
</tbody>
</table>

Open-ended responses related to identity in the workplace—from both respondents of color and white respondents—often addressed or referenced challenges faced by people of color in the workplace.

Respondents also referenced other dimensions of diversity, such as age, political leaning, and class background. The study did not ask about the political leanings of respondents, or about their perceptions of the political leanings of their institutions as a whole. This could have yielded additional insights.

Survey Respondent

"I bring perspectives — as a woman, of color, from lower socioeconomic status, seeking to overcome and move ahead. Thus, the daily realities of surviving, thriving and accomplishment are part of my mindset and work ethic. I find my identities at odds with those of privilege...Struggle is not part of their thought process...Thus, when I express concern for certain populations or conditions, they look at me perplexed, as if trying to puzzle why such thoughts would cross my mind, oblivious that I am part of the “other” being served."

Survey Respondent

"Philanthropy plays a very important role and is dangerously non-inclusive and unaccountable."

Survey Respondent

"I have on multiple occasions been told I have no experience, including that specific aspects of my resume do not really count as jobs in my supervisor’s eyes. As the youngest person on my team I am reminded constantly that I should not have thoughts or opinions on what is being done."

Survey Respondent

6. For a number of measures, reports on experiences in the workplace varied by racial identity—sometimes in surprising ways that bear further exploration.

While the written responses of both white practitioners and practitioners of color paint a picture of how philanthropy can be isolating and disempowering for minorities, quantitative analysis of the survey responses produced some unexpected results.
Participants who identify as Latino reported considerably less agreement than non-Latino peers that they have an ally or advocate on their senior team, reported less pride when they tell someone where they work, and on the whole feel less of a sense of belonging in their institutions. They reported less success at having the influence they want, less ease moving through their institutions as people with their identities, and less agreement that they see a future for themselves at their institutions. These findings mirror what was heard in open-ended responses.

As the only person of color on my team, I often feel like a token. It is even joked that I am their “Latino consultant”. My organization serves a majority Latino population. The majority of my organization comes from backgrounds of privilege and struggle to identify with those we were designed to serve.

Survey Respondent

Our other explorations into differences by racial subgroups yielded a surprising result. While they did not differ from their peers on most measures, Black practitioners were more likely than their non-Black peers to report being seen as a leader in their institution, to see a future for themselves in the foundation world, and to perceive a clear path to advance from their position. As we investigated this further, we found that compared to the rest of the sample, the only demographic differences that emerged between Black respondents and others was that a greater proportion of Black respondents were from the South. In general, respondents from the South scored higher on the first two of the above three measures than peers in other regions.

We caution that these should not be taken to mean that Black practitioners do not experience similar challenges as other people of color (POC) in philanthropy — in many ways their open-ended responses echo that of their peers, and EPIP has heard many personal accounts from its Black members that mirror the larger findings in this survey.

While I do feel that my workplace is generally supportive of all identities, my colleagues could use more training in terms of understanding the impact of having less privileged identities, and how we should apply social justice concepts in our work.

Black Survey Respondent

This is the first time I’ve ever felt [so positively]. Black, Muslim, gender queer and from the East Coast so . . . not always getting the most welcoming vibes from most places . . . My boss is a Black woman. That’s never happened for me and it’s never happened for older members in my family. As I identify as Black and philanthropy has an abundance of white women, it is a huge point of pride for me.

Black Survey Respondent

I am the only person of color in the entire organization. Also my age has been a factor, my appearance makes them think I am ten years younger than I am. Because of my being a minority and a woman, I think there is a lack of respect towards me by the Board of Trustees.

Black Survey Respondent

Finally, subgroup analyses also explored how the experiences of grantmaking staff — those closest
to grantees — varied by racial subgroup. Exhibit 6 highlights the differences that emerged within grantmaking staff between practitioners of color and white practitioners. Practitioners of color tended to report more challenging experiences related to identity in the workplace, are less likely to have an ally on the senior team, and have a more critical outlook as to whether grantees are able to provide feedback without fear of reprisal.

However, white grantmaking staff were less likely to report having a clear path to advance from their position. In fact, 50 percent of white grantmaking staff (n=40) strongly disagree that they have a clear path to advance, compared to only 20 percent of people of color (n=30).

**EXHIBIT 6. DIFFERENCES IN RESPONSES BETWEEN WHITE GRANTMAKING STAFF AND GRANTMAKING STAFF OF COLOR (POC)**

(Percent of Practitioners Who Agree or Strongly Agree with Each Statement)

- **My institution makes it possible for grantees to provide feedback without fear of reprisal.**
  - **POC:** 30% (n=30)
  - **White:** 63% (n=40)

- **It’s easy to move through my institution as a person with my identities.**
  - **POC:** 24% (n=30)
  - **White:** 52% (n=40)

- **Sometimes it is harder for me to get approval, funding, or other resources than another person in my same position, likely because of one or more of my identities.**
  - **POC:** 17% (n=30)
  - **White:** 5% (n=40)

- **I have a clear path to advance from my position.**
  - **POC:** 10% (n=30)
  - **White:** 0% (n=40)

Among other differences, LGBTQ-identified respondents feel less of a sense of belonging in their institutions than their non-LGBTQ peers. Twenty-six percent of LGBTQ respondents either agree or strongly agree that they do not disclose one or more aspects of their identity out of concern for how they will be perceived, compared to ten percent of their non-LGBTQ peers. They reported less agreement that their colleagues know how to maintain a safe workplace for those from less privileged backgrounds. They also reported less belonging, less alignment between their institution’s mission and their own, and less agreement that their institutions are accountable to the communities they serve. See Exhibit 7.

Microaggressions are a daily part of my work. I am a queer person of color, I am not out about being queer at work. I also do not wear my curly hair down as I have gotten “woah” comments and touched.

_Survey Respondent_
8. Grantmaking staff tended to rate numerous DEI-related measures less favorably than their non-grantmaking peers.

This was particularly pronounced in private and family foundations, where grantmaking staff rated their institutions lower than their non-grantmaking peers on nine of eleven DEI-related dimensions of workplace culture. For example, nearly two-thirds (65%) of non-grantmaking staff agree or strongly agree their institution’s board is a strong ally for equity, while only 20 percent of grantmaking staff feel the same. See Exhibit 8.

The Board doesn’t understand equity and social justice at all, so we don’t even use that language when we’re making the case for funding. They’re not interested in risk-taking, rocking the boat, anything that their social network might raise eyebrows at. It’s a frustrating environment to work in.

*Survey Respondent*

Though we have an explicit equity lens we do not talk about equity issues, such as race and identity, enough within the organization. It is sometimes assumed by many that we all embody the same values but in the wake of incidents over the last few years, we have had internal situations that clearly indicate we do not all embody the equity lens and frame.

*Survey Respondent*
9. Only 40 percent of respondents believe that their institutions are in touch with the needs of the communities they support, and only about one in four (24%) reported that the communities they serve have voice in decision making.

Exhibit 9 below shows practitioner ratings of their institutions’ engagement with the community.

While some practitioners highlighted positive strides made by their organizations — such as having rapid response funding, soliciting grantee feedback, or minimizing reporting — many highlighted gaps, inaction, or barriers to action (even if their institutions are well-meaning).
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EXHIBIT 9. INSTITUTION ENGAGEMENT WITH COMMUNITY

(Percent of Practitioners Who Agree or Strongly Agree with Each Statement)

- My institution’s work is relevant to what’s happening in the world today. (n=114) 50%
- My institution is in touch with the needs of the communities we support. (n=111) 40%
- In my institution, we talk openly about equity during the course of our work. (n=114) 27%
- My institution minimizes the time and effort required from grantees we support (n=113) 32%
- My institution is accountable to the communities we support. (n=111) 32%
- My institution responds quickly to pressing issues in the communities we support. (n=112) 25%
- The communities we support have voice in decision making. (n=107) 24%

We ask for very minimal reporting, don’t require a grant application, provide multi-year general operating support and involve our partners in planning for evaluation, technical assistance, etc.

Survey Respondent

I think our staff would be open to more community involvement and accountability, not so sure about the board.

Survey Respondent

My organization started implementing a DEI lens and training over five years ago. The challenge with community foundations is process; we aren’t nimble nor are we able to respond to today’s issues in a profound way. We do what we can without rocking the boat.

Survey Respondent

When talking about changes they would like to see, numerous practitioners discussed wanting greater engagement from institutional leadership, or changes in institutional leadership; more diversity and greater community representation in leadership; internal processes that are more efficient, nimble and supportive of community; more direct engagement with community; and greater accountability to community.
I would like to see a real commitment from the foundation leadership to encourage and support a leadership pipeline from within...

Survey Respondent

More authentic engagement with the communities we want to serve, such as asking community leaders to be part of proposal reviews or advisors during program development.

Survey Respondent

Outlook on Philanthropy

10. Ultimately, only about half of the survey respondents (51%) perceive philanthropy to be an effective player in social change. Grantmaking staff tended to rate its effectiveness lower than their non-grantmaking peers.

When asked what they most appreciate about working in philanthropy, respondents mentioned being part of institutions that can influence change, supporting communities, building relationships, representing communities, and supporting change. When asked what they wish were different, they spoke about wanting more progress on diversity, equity, and inclusion; greater accountability and representation; and more risk taking. Some also expressed a desire for institutions to trust grantees more, and to be more justice-oriented.

11. Just over half (55%) of respondents see themselves leaving philanthropy within the next five years.

One in four responding (25%) practitioners said they anticipate staying for two or fewer more years, while an additional 30 percent selected 3-5 years.

When asked why they might eventually leave philanthropy, respondents envision a variety of reasons, such as leaving to make a bigger impact in a different way, feeling discouraged or disempowered, leaving due to lack of opportunities to advance, or leaving to go back into the nonprofit sector or into other fields, like academia. Since philanthropy is a field whose lower ranks are significantly more diverse than its higher ones, this finding merits further investigation.

When I do leave philanthropy, it will likely be because...

I can have greater impact through scale in another sector; I'm ready for a new challenge; or I want more flexibility and autonomy to lead and there are few women of color in top-level foundation positions.

Survey Respondent

I have not had enough opportunities for advancement and career growth.

Survey Respondent

I've gotten tired of a top-down mentality and I will probably go back to the nonprofit world or at least find a more grassroots position.

Survey Respondent
I believe that philanthropy can and should be an effective player in social change, but it requires culture change to encourage risk, create meaningful equal partnerships, and push our Boards (who are disproportionately populated by people of privilege with systemic access to power - male, white, wealthy, connected) to embrace this. Social change will be uncomfortable for many of our board members, trustees and veteran staff in philanthropy. I believe this is especially in the South where we seem to have a special reverence for structural systems that stratify power (race, poverty, religious affiliation, family connections). Philanthropy also needs to reorganize internal processes to be nimble enough to be relevant in social change work and responsive to the environment. I am lucky to work at an institution that has questioned and addressed these things, but we need more peers to do the same.

Survey Respondent

**Staff Size: An Additional Note About Our Findings**

One institutional variable in particular stood out during our analysis. **On over a dozen measures, respondents from foundations with larger staff sizes reported less positive experiences than their peers from foundations with smaller staff sizes.** The larger the staff size of the respondent’s institution, for example, the less likely that respondent was to agree that they are able to set appropriate boundaries to maintain work/life balance, are seen as a leader in their institution, or have the influence they want. Respondents at larger institutions also expressed less agreement that they see a future for themselves at their institutions, or that they see a future in the foundation world overall. These differences were not isolated to measures having to do with satisfaction, leadership, and advancement. They influenced numerous dimensions of diversity, equity, and inclusion as well. For instance, respondents from larger institutions tended to rate their institutions lower when it comes to valuing lived experience as much as traditional credentials and making it possible for grantees to provide feedback without fear of reprisal.

Exhibit 10 displays the items for which greater staff size corresponded with less positive ratings on survey items.
Implications

The data in this study suggest a sobering disconnect between philanthropy’s aspirations and its realities with respect to diversity, equity, inclusion, and cross-level organizational leadership. The challenges identified here merit further exploration and dialogue within and across institutions. In particular, the questions below may help to shed further light on ways in which institutions can more fully support practitioners at all levels and from all backgrounds. Some of these questions have been well addressed by organizations working to
advance DEI in philanthropy, and effective practices are known — in these cases, our findings should underscore the urgency of action. In others, further discussion is needed.

• How can we better understand the cultural and structural barriers to full engagement and retention of entry- and mid-level foundation staff?

• What are the practices and behaviors that alienate or marginalize employees who identify as people of color or LGBTQ? What prevents institutions from correcting these behaviors?

• How can feedback loops between staff with more and less power be strengthened to facilitate the effective airing and resolution of challenges within institutions?

• How can institutions create more leadership opportunities for staff up and down the organizational chart while still completing their core work?

In addition, EPIP recognizes the need for additional focus on intersectionality as the field navigates questions like the ones above. In this study, some of the most pointed comments often came from respondents who carry multiple historically marginalized identities, such as being a woman, a person of color, identifying as LGBTQ, and/or coming from a low-income background. This suggests that exploring the experiences of people carrying multiple marginalizations may be instructive in addressing the issues surfaced in this report.

EPIP will be working with its members and others to explore these questions and will share what we learn from those explorations.

Acknowledgements

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Supriya Kumar, Foundation Center
Amy Shields, Grantmakers for Effective Organizations
Rusty Stahl, Fund the People
Suprotik Stotz-Ghosh, Grantmakers for Effective Organizations

We would also like to thank the many people who suspended any disbelief they may have had that change in philanthropy is possible in order to share sometimes painful experiences with us. We hope this report faithfully represents your experience and that it will be a resource to you as you engage your colleagues and advocate for yourself and/or others.

Finally, we would like to highlight some literature that directly complements our research — including some which preceded and inspired/informed it. We highly recommend these pieces for further study:


Appendix A: About the Sample

This report explores the experiences of 114 foundation professionals. Below are more details about the sample.

Foundation Type. As shown in Exhibit I, respondents from private and/or family foundations comprise a little over half of the survey sample (55%). Respondents from community foundations and/or public charities comprise an additional 34 percent. Five percent of respondents are from corporate foundations, and the remaining five percent of respondents selected “other.”

EXHIBIT I. TYPE OF FOUNDATION OR PHILANTHROPIC INSTITUTION (n=114)

<table>
<thead>
<tr>
<th>Type of Foundation or Philanthropic Institution</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate Foundation</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
</tr>
<tr>
<td>Community Foundation and/or Public Charity</td>
<td>34%</td>
</tr>
<tr>
<td>Private Foundation and/or Family Foundation</td>
<td>55%</td>
</tr>
</tbody>
</table>

Race/Ethnicity. Exhibit II below highlights the breakdown of respondents by race/ethnicity. Forty-six percent of respondents identify as people of color. By contrast, 2016 study by Council on Foundations found that people of color accounted for only 26 percent of full-time foundation staff.7

EXHIBIT II. RACE OF SURVEY RESPONDENTS 1 (n=108)

- White/Caucasian: 63%
- Black/African American: 17%
- Asian: 16%
- Midwest: 11%
- Pacific Islander/Native Hawaiian: 5%
- Middle Eastern/North African: 1%

1 Percentages in this chart total to over 100 percent, as respondents were asked to check all identities that apply.

Gender. As shown in Exhibit III, the vast majority of respondents identify as women. This is higher than representation in the US on the whole. A 2016 study by Council on Foundations found women to be 76 percent of full-time foundation staff.

**Exhibit III. Gender of Survey Respondents (n=111)**

<table>
<thead>
<tr>
<th>Gender</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men</td>
<td>11%</td>
</tr>
<tr>
<td>Women</td>
<td>87%</td>
</tr>
<tr>
<td>Genderqueer or Non-Binary</td>
<td>2%</td>
</tr>
</tbody>
</table>

Age. Most respondents are between 26 and 40 years of age. See Exhibit IV below. The 2016 study by Council on Foundations found that individuals under the age of 30 only accounted for 11 percent of full-time staff, whereas they account for 43 percent of respondents here.

**Exhibit IV. Respondent Age (n=108)**

<table>
<thead>
<tr>
<th>Age</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;25</td>
<td>7%</td>
</tr>
<tr>
<td>26-30</td>
<td>36%</td>
</tr>
<tr>
<td>31-35</td>
<td>29%</td>
</tr>
<tr>
<td>36-40</td>
<td>21%</td>
</tr>
<tr>
<td>41+</td>
<td>7%</td>
</tr>
</tbody>
</table>

Seniority. Respondents were asked about their level of seniority in their foundation. A little over half of respondents are mid-level staff (such as program officers). Thirty-seven percent identified themselves as associate/entry level, and the remaining nine percent are senior level.

**Exhibit V. Respondent Level of Seniority (n=114)**

<table>
<thead>
<tr>
<th>Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associate</td>
<td>37%</td>
</tr>
<tr>
<td>Mid-Level</td>
<td>54%</td>
</tr>
<tr>
<td>Senior</td>
<td>9%</td>
</tr>
</tbody>
</table>

Geography. The West Coast and East Coast comprise the largest geographic groups, representing 44 percent and 31 percent of the sample respectively (n=112). Thirteen percent of respondents are from the Midwest and an additional 13 percent are from the South.

LGBTQ-Identified. An LGBTQ variable was created based on respondents’ answers to questions about gender and sexual identity. Based on their responses, 21 percent of respondents who answered these questions (n=108) were identified as LGBTQ.

Appendix B: Methodology

Building on what was learned through interviews and interactive activities during EPIP’s strategic planning process in Winter 2017, the Sector Experience Survey was developed to explore five dimensions of the workplace experience: contribution and advancement, identity and the workplace, organizational culture, institution in the community, and experience with philanthropy as a field. The survey focused particularly on issues of diversity, equity, and inclusion alongside overall feelings of autonomy, contribution, belonging, and effectiveness.
There are distinct strengths and limitations of the approach taken to reach a diverse array of practitioners in the field.

**Strengths of the Approach**

- **Breadth.** The survey asked about a broad range of topics, creating space for practitioners to share many dimensions of their experience.

- **Geographic Reach.** People from all regions of the United States participated in the survey.

- **Focus on Early- and Mid-Career Professionals.** The survey sought to capture the experience of early- and mid-career practitioners, focusing on a group whose insights don’t always reach the top of the chain of command.

- **Inclusion of Individuals Beyond EPIP’s Membership.** By including respondents outside EPIP’s membership, the survey engaged a broader swath of early- and midcareer professionals in the field.

- **Racial Diversity.** Forty-six percent of respondents are people of color, a higher proportion than in the field as a whole (26%).

**Limitations**

- **Length.** The survey was relatively long. Some participants may have experienced survey fatigue, which could lower the completion rate or affect the quality of responses.

- **Sample Size.** While the survey generated rich data, the sample size— particularly the sizes of racial identity subgroups — is still relatively small. Additional data would lend to more robust conclusions.

- **Sampling.** The survey was deployed through EPIP’s networks, which made it less likely to reach practitioners not already connected to either EPIP, active EPIP members, or EPIP partners.

- **Gender Diversity.** The vast majority of respondents identify as women (87%). Many fewer identify as men (11%), and only two percent identify as genderqueer, non-binary, or transgender. In the field as a whole, women account for 76 percent of full-time staff.

- **Class Background and Political Leanings.** The survey did not capture information on class background or political leanings of respondents, which likely would have yielded additional insights.

- **Geographic Representation.** In part due to outreach strategy, the San Francisco Bay Area is overrepresented in the sample (25%).