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**WhitworthKee** Consulting

# **Lilly Family School of Philanthropy (LFSOP)**

## **Diversity, Equity and Inclusion Assessment**

**Conducted by**  
Washington Consulting Group &  
WhitworthKee Consulting, LLC

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# Overview and Purpose

Washington Consulting Group (in partnership with WhitworthKee Consulting, LLC) partnered with the Lilly Family School of Philanthropy (LFSOP) at Indiana University Purdue University—Indianapolis (IUPUI) in May 2021 to assess its current school climate as it relates to diversity, equity inclusion (DEI), and an anti-racist agenda. This report centers around identifying school challenges, opportunities for growth, areas of success related to DEI, and recommendations for an anti-racist school strategic plan.

The approach used to guide this assessment was to:

- Conduct an environmental scan to identify existing diversity, equity and inclusion practices.
- Facilitate focus groups to identify diversity, equity, and inclusion experiences of past and current faculty, students, staff; as well as alumni and board of visitors.
- Develop a comprehensive report to share findings, trends and patterns from the environmental scan and focus group sessions.
- Recommend an action plan of short- and long-term goals to institutionalize diversity, equity, inclusion and anti-racist initiatives that can inform the LFSOP strategic plan.

This assessment is the next key step in identifying the needs relative to DEI across LFSOP and providing anti-racist strategies for developing a strategic plan.

Overarching guiding assessment questions were:

1. What characteristics of, and activities in the school makes members feel more or less valued?
2. How inclusive is LFSOP for all community members?
3. What is equity and what is an equitable organization? To what extent is LFSOP equitable and how can it be more equitable?

#### 4. What can be done to support DEI and anti-racist initiatives in LFSOP?

In phase one, a school environmental scan was conducted to identify existing diversity initiatives and inclusive activities. The environmental scan was followed by phase two, focus group sessions with students, staff, faculty, and alumni to identify challenges, opportunities for growth, and areas of success within LFSOP. This comprehensive report focuses on information ascertained from focus group sessions with past and current students, staff, faculty and alumni.

## Methodology

This report is based on the environmental scan and analysis of seven focus group sessions that were conducted with LFSOP alumni, faculty, staff, students and board of visitors. The initial approach to recruiting participants for the focus groups began with email invitations to students and alumni and current and former LFSOP staff, faculty and board of visitors in July 2021. The email included a recruitment questionnaire that collected each respondent's willingness to participate in a focus group session and their demographic information. The recruitment deadline was extended until the beginning of September for faculty and staff returning to campus for the fall 2021 semester. The total number of individuals invited to participate in a focus group session was 102. Seven one-hour focus group sessions with 35 participants were conducted in September – October 2021 via Zoom meetings. Each focus group was organized by an affinity group with a similar demographic and position from the recruitment questionnaire in order to mitigate power dynamics in sharing feedback. The list of focus group sessions and number of participants is listed below (See Table 1). Despite the relatively low focus group sizes for some affinity groups, they were included in the report to allow for the inclusion and acknowledgement of all current and past experiences within LFSOP.

**Table 1**  
**LFSOP Focus Group Sessions September-October 2021**

Affinity Group	No. of Participants Invited	No. of Participants
BIPOC Staff and Former staff	10	4
Non-BIPOC Faculty + International Faculty	9	4
Non-BIPOC Staff + International Staff	23	9
BIPOC Alumni/Formal Students + BIPOC Board of Visitors	24	5
BIPOC Students + Board of Visitors	11	4
BIPOC Faculty and Former faculty	6	3
Non-BIPOC Students + Board of Visitors	19	6
<b>Total</b>	<b>102</b>	<b>35</b>

The focus groups were conducted using a semi-structured focus group protocol. The focus group protocol was informed by the content and the environmental scan of materials provided by LFSOP and discussion with key staff of LFSOP. Each focus group participant was required to give consent before being recorded in the focus group sessions. Focus group sessions were facilitated by research associates. Focus group sessions lasted approximately one hour. Participants were asked not to share information discussed in the focus groups with others who did not participate in the focus group. The focus group sessions were transcribed for analysis. The data from the focus group sessions were analyzed using NVivo® qualitative software and field notes. The findings are presented below in the aggregate and without attribution or names.

## Findings

Findings are organized and presented based on the analysis of the respondents' general perception of diversity, equity and inclusivity recommendations from LFSOP

alumni, staff, faculty, graduate and undergraduate students. These issues were examined in relation to the relevant identity and role of participants (e.g., job position, gender, race/ethnicity, sexual orientation and disability status). Direct quotes from focus group sessions were included where appropriate to illustrate key themes, significant answers, key recommendations for DEI, and anti-racist strategic initiatives.

## Aspects of LFSOP Most Liked

The most common answers were from Board of Visitors, faculty, and staff regarding what they liked most about LFSOP were as follows:

- The Mays Family Institute on Diverse Philanthropy—that LFSOP even has an institute that focuses on diverse philanthropy
- Commitment to mentorship and effective mentorship—having longstanding mentoring relationships as a result
- Supportive staff that contributes to students' growth and development
- Development of programs also focused on community philanthropy for K-12 education
- The support and welcoming community to international students and scholars
- Providing funding and recognition around the state (especially in recent years)
- Being respected by the community

Graduate students also expressed appreciation for LFSOP's staff and faculty's willingness to research, answer questions that arise, and provide resources within LFSOP and in the community. Graduate and undergraduate students expressed their appreciation for:

- The expertise of faculty across LFSOP

- The support individuals provided across LFSOP to one another during the pandemic
- Community engagement, teamwork and collaboration, and innovation

Some graduate and undergraduate focus group participants felt supported and cared for by both faculty and staff within LFSOP. An international BIPOC graduate student noted how supportive and welcoming they felt as they transitioned into graduate school at LFSOP:

*“Beyond that, too, just the faculty have been amazing. Even though it's remote, I wasn't sure going back to school after so many years what it was going to be like. I found it to be a very welcoming environment where my ideas, thoughts, everything was really welcomed. I was new, getting back into school, and there was a lot of support there, a lot of understanding. So, it was really a good, good place. And I felt the very nice family, welcoming atmosphere from the very beginning and that has continued.”*

**– BIPOC Graduate Student #1**

An undergraduate student noted how supportive the staff have been in suggesting them for opportunities like internships:

*“One thing I really like about LFSOP is that I think the staff, they take time to really get to know each other and the students. I feel like those who work there know me and that has led to an example that sticks out to me is that I've been told, ‘Hey, I heard about this internship, and I think you would be perfect for it.’ I actually got an internship that way and it was amazing last summer. They're like, ‘You're the first person I thought of because it's fit perfectly with everything you'd like to do.’ That just felt really nice, too, and it was perfect.”*

– **Non-BIPOC Undergraduate Student #2**

Overall, focus group participants expressed that they enjoy working with the people of LFSOP and engaging and learning about the scholarship of philanthropy from leading scholars. Staff expressed an investment in their work and supporting students with a comprehensive academic advising and career planning model. Once staff member described a culture of care:

*“We care about each other, we want to make sure people are doing well, both personally and professionally. And I think that extends out to kind of our network and our alumni group, and even other stakeholders who are within the larger philanthropic community. I think everyone is very quick to help make a connection, open a door, and that’s something that’s really valued.”*

– **Non-BIPOC Staff Member #5**

## Diversity

The focus group participants were asked their perceptions of “diversity” and to describe diversity within LFSOP. They were then asked in what ways diverse identities, ideas, and ways of thinking and working are valued or not within LFSOP. Students hoped for more diversity and representation in the curriculum. Common responses from focus group participants are included below.

Participants shared perceptions of “diversity” within LFSOP as having to do with representation, including:

- Including people of different backgrounds and cultures
- All types of people from different demographics
- Acknowledging and embracing difference

- Learning new things (learning what one doesn't know)
- Including different positions and roles
- Many opinions and experiences leading to richer discussion
- Being open to different ways of thinking and being
- Different lived experiences

## LFSOP Diversity Challenges

LFSOP current and former students, faculty, staff, alumni and board of visitors (BOV) expressed concerns about challenges surrounding diversity within LFSOP. There were some differences in perceptions based on role and racial/ethnic identities. These differences are explored below.

The most common theme related to diversity challenges centered on the fact that the majority of LFSOP faculty are White, perceived middle to upper middle class, and able-bodied. Students expressed there seemed to be a “disconnect” between students’ desire for a more diverse and representative curriculum and the curriculum in which the faculty design.

*“I've also heard that from another student who was a male student who questioned the curriculum in class and asked why a lot of the curriculum that was cited in regard to research was primarily Caucasian people and were they able to also implement People of Color into the curriculum? And so, he [the student] then said that he felt like the angry Black man who had issues and was trying to question the system as he had said.”*

**– BIPOC Staff #1**

A BIPOC faculty member noted that this not only is a concern with the curriculum but also with diversifying guest lectures and speakers:

*“There's a research seminar where scholars are invited to come in and historically most of those scholars have been White, and more recently been more diversified. But I think that needs to increase. And I mean, there were years when all the scholars were White what would it look like where all the scholars or People of Color? So, I think continuing and doing more to make those connections is important.”*

**– BIPOC Faculty #3**

Additionally, community members felt there is a need to educate community members that People of Color are not a monolithic group and hold many different identities, races, and ethnicities. A BIPOC staff member shared there was difficulty expressing all of their intersecting identities at LFSOP:

*“When you're of multiple minoritized identities and multiracial, it's less recognized I think by other people that you're a Person of Color, by White people, that you're a Person of Color. When you're clearly African American or you're clearly White, most people have diverse backgrounds, but it's a little different than living on a hyphen. And so, I have multiple identities, none of which I bring to work or to my learning environment and yet all of which I bring to that space.”*

**– BIPOC Staff #2**

Staff focus group participants also noted that there are unique challenges with diversity in LFSOP based on role and context, including getting the tools and professional development to engage in DEI conversations and professional development. Many participants expressed the need for more DEI professional development:

*“I mean, I think from a lot of this conversation, a lot of us are starting to feel like we're getting stretched really thin, we don't have the tools, we don't have the support, so what would go a long way from leadership in the school is to make us feel like it's a better climate is getting some of those professional development opportunities. Whether it's through professional development or whether its leadership taking a step back and being willing to reduce project load somehow.”*

**– Non-BIPOC Staff #3**

Some focus group participants expressed concerns regarding the challenges of recruiting LFSOP faculty and staff, especially BIPOC. When it comes to recruiting more Faculty of Color, some faculty leaders expressed a commitment to recruit more faculty and administrative Leaders of Color in LFSOP but were not sure of the best practices to do this. These concerns lead to issues of inclusion which are highlighted in the next section.

# Inclusion

The focus group participants were asked their perceptions of “inclusion” and to describe inclusion within LFSOP. They were then asked in what ways LFSOP is or is not inclusive to individuals with different identities. Students expressed feeling valued by faculty when faculty ask for feedback. Focus group participants expressed that the lack of feeling included leads to retention and recruitment concerns. Key themes of inclusion that emerged are provided below.

Focus group participants shared perceptions of inclusion generally and in the context of LFSOP. Perceptions included:

- Valuing people’s differences, including divergent voices
- Ensuring people/everyone can participate
- Making sure everyone is at the table and has equal amounts of capacity to share their perspectives
- Feeling welcomed by all in the community
- Creating a space with no microaggressions
- Including more voices with intentionality
- Allowing space for everyone to be their true authentic selves

Students expressed feeling valued and included when faculty ask for feedback and engage in conversation with students.

*“I do feel valued when faculty not only try to incorporate a discussion that values diversity, but also when they ask for feedback in regard to the school as a whole. I know somebody said that this is something the school does well, I have to agree. I think when they asked for feedback, when*

*they let you meet with the dean, and things like that, it really makes me feel valued.”*

**– Non-BIPOC Student #3**

## LFSOP Inclusion Challenges

There were a number of concerns raised about LFSOP’s sense of inclusion that mirror some of the observations above concerning diversity. This included a lack of cultural proficiency, including lacking cultural awareness, insensitivity to issues around inclusive curriculum, and the impact of power dynamics with leadership/supervisors, faculty and staff. Among staff participants, there was a strong feeling that there needed to be space to have honest conversations. One of the requests by several participants was guidance on engaging all LFSOP members, especially faculty, who are reluctant to do DEI work. This seemed to be a common frustration and challenge that can be addressed in future professional development and capacity building. Prospective graduate and undergraduate students also expressed to faculty members not feeling welcomed to apply to LFSOP and being directed to other programs at IUPUI like Urban education:

*“There were several [People of Color] that I came in contact with who had told me that they had actually applied to our doctoral degree program through the Lilly Family School of Philanthropy. And unfortunately, they didn’t feel that they were welcomed into the school because the individuals that they actually met with really kind of geared them towards education, that there was a doctoral degree within the school of education that focused on urban education versus the doctoral program through philanthropy.”*

**– BIPOC Staff #1**

There were more specific concerns identified in terms of retention that links to inclusion:

*“Hearing a lot of those comments from the students, that also goes right back to retention. As we're trying to increase BIPOC students here, I want to make sure that we're able to retain them as well and make sure that they feel that this is an environment that's conducive to their learning.”*

**– BIPOC Staff #1**

A BIPOC faculty member noted that expanding the LFSOP definition of philanthropy might help with addressing issues of inclusion:

*“I think it is important to, again, rethink the definitions of philanthropy so we could be more inclusive, because different communities think about this thing differently, and that can create some bridges and opportunities as well.”*

**– BIPOC Faculty #1**

The lack of in-person interaction during the COVID-19 pandemic also seemed to hinder relationship building between LFSOP community members, something that was expressed as a concern. Technology seemed to facilitate or hinder sense of belonging based on different perceptions and experiences. For some BIPOC students, technology allowed for more flexibility in participating in class, LFSOP meetings and other activities; whereas some of the non-BIPOC students commented that technology hindered relationship building, especially with new students.

There were also comments concerning the importance and value of including staff in planning and decision making. One non-BIPOC staff member, shared the success in a previous role of engaging staff in the development of their mission and

vision statement, and in sharing power and responsibility for meetings and decisions. They noted that this helps to support sense of belonging as well.

## Equity

LFSOP focus group participants were asked to define “equity” and what an “equitable organization” looks like. They were then asked in what ways LFSOP is or is not equitable to individuals with different identities and how could LFSOP be more equitable.

Equity was defined by participants generally and in the context of roles within LFSOP. Responses included:

- Removing barriers
- Receiving the same service, no matter what
- Treating everyone the same
- Leveling the playing field to create equal opportunities
- Gathering input from a variety of interested parties
- Offering “good” pay and workspaces for staff
- Providing community members with what they need (may differ based on circumstances)—equity does not equal equality

BIPOC staff focus group participants shared that they felt their colleagues are reluctant to speak up or bring about concerns with DEI forward because of fear of retaliation, which may hinder equity efforts.

*“Staff don't often speak up because there is a governing structure when a staff member experiences bullying, for example, that really is over here for staff. If that bullying is by an administrator or a faculty leader, they're not governed by the same HR processes. You've got to jump over to faculty governance and that is all but unknown to staff. So, that's the risk. The risk is that there will be retaliation and I've heard instances of retaliation. I personally have experienced retaliation. And so those are the risks that I'm referring to.”*

**– BIPOC Staff Member #2**

Additionally, during the faculty focus group, some participants seemed reluctant to share due to power dynamics within the focus group. There was a spoken and unspoken tension amongst non-BIPOC faculty within their focus group and also some tension expressed from staff towards faculty during the non-BIPOC and BIPOC staff focus groups.

## What Can Be Done to Make LFSOP More Equitable?

Focus group participants were then asked what could be done to make LFSOP more equitable. One BIPOC staff stressed the need for consistency across the school leadership on issues of DEI:

*“The person with the power sets the culture. And I've heard tremendous things about current leadership, and I have seen some tremendous things. But what's not sustainable are individuals coming to a leader, telling and*

*sharing their stories and that leader being impassioned enough to do something in that time. There needs to be a concerted effort to bring all the leadership on the same page, so that it's not a point of who's having the problem, it's more about what structures and what systems are in place to address what we already know is happening.”*

**– Former BIPOC Staff #1**

Other recommendations included more funding to recruit, hire and retain diverse staff and faculty. Additionally, funding was suggested to provide meaningful and impactful DEI programming across LFSOP that is beyond the Mays Institute. Recommendations around issues of equity also included giving people options, especially now that virtual meetings and activities are so widespread, that include:

- Allowing virtual meetings
- Allowing staff to work remotely
- Creating more virtual community building opportunities
- Ensuring all spaces are fully accessible, in terms of language and physical needs (such as wheelchair accessibility)
- Ensuring that interested parties, especially members of the community, are involved in decision making that will affect them

The existence of unwritten rules and unequal access to power and influence affects trust and the degree to which staff feel valued. There was a suggestion for LFSOP to consider how inequities are maintained. A former staff discussed how hierarchies can be addressed so faculty, staff and students can feel more included within LFSOP:

*“Find ways of removing hierarchy. Understanding that by removing hierarchy, you're not removing folks' positions, titles, status, but you're removing what comes with hierarchy and that is restrictions. Make sure everyone feels like an insider. This is the issue of belonging. Does everyone feel like an insider?”*

**– Former BIPOC Staff #1**

## Desire for Diversity, Equity and Inclusion Training and Capacity Building

Focus group participants overwhelmingly shared the need for DEI trainings, capacity building and coaching across LFSOP, from the board of visitors to staff to LFSOP community partners. More community focused DEI training, capacity building and coaching will help LFSOP to engage collectively and center the lived experiences and perspectives of all in the LFSOP community, especially prioritizing BIPOC community members. One BIPOC staff member cautioned, it is important that additional trauma does not occur for Students, Staff and Faculty of Color who have directly experienced the effects of institutionalized racism in their experiences. Training needs identified centered around:

- Racial equity
- Addressing faculty classroom bias
- Changing mindsets from a deficit perspective to an asset perspective
- Focusing on healing and learning, such as “listening circles” (“calling members of the community into DEI conversations” rather than “calling out”)
- Diversifying LFSOP faculty search pools
- Diversifying LFSOP staff search pools
- Building capacity to strengthen cultural competence

- Expanding culturally relevant philanthropy practices

## Summary

Across LFSOP there is a recognition of the need for professional development, capacity building, coaching and action relative to diversity, equity and inclusion. Many of the focus group participants commented that they have seen LFSOP's work improve in its effectiveness and its impact under the current leadership, and they are looking to LFSOP to support their efforts relative to DEI training and capacity building. In summary, LFSOP members seem to have different perceptions of diversity, equity and inclusion within LFSOP, and they overwhelmingly recognize the under representation of BIPOC faculty and staff. LFSOP members recognized the need to diversify leadership, staff and faculty. Based on the focus group assessment, there seems to be support for LFSOP to evolve to the next level in terms of advancing DEI to develop anti-racist initiatives.

# Limitations

There were a few limitations with conducting this DEI assessment for LFSOP. First, the invitation sent to the LFSOP community members had a low response rate. This may have been due to the timing or given the relatively short time frame that was available to recruit focus group participants. There was also uneven participation in the different affinity groups organized for each of the seven focus groups. This was due to scheduling conflicts and needing to complete focus groups by the end of September 2022. Nevertheless, the data that was collected provided robust feedback and some helpful examples of DEI efforts that other programs might emulate or adopt to inform the strategic plan.

# Washington Consulting Group Recommendations

Based on the focus groups and assessment to date, Washington Consultant Group and WhitworthKee Consulting recommend the following:

- Consider a phase two in the DEI assessment: We recommend implementing a school-wide survey to increase participation and collect additional anonymous data. Additionally, more data will support assessing benchmarks of the strategic plan.
  - For example, using final goals of the DEI strategic plan initiatives as ongoing benchmarks for data collection and analysis will support this assessment.
  - Due to fears of retaliation, BIPOC faculty and staff might feel more comfortable responding to an anonymous survey specifically designed to center minoritized experiences in LFSOP.

- Increase representation and diversity in LFSOP by allocating resources to advance diversity initiatives for staff, faculty and students.
  - For example, implementing recruitment strategies to recruit students and employees to LFSOP such as partnerships with Historically Black Colleges and Universities (HBCUs), Hispanic Serving Institutions (HSIs), and other Minority Serving Institutions (MSIs).
  - Increase partnerships and professional development opportunities for staff with national professional associations advancing DEI initiatives.
  - Establish a scholarship fund and professional mentoring program for BIPOC students to attend LFSOP at no out-of-pocket cost.
- Establish clearly defined and shared goals for DEI for staff, faculty, students, alumni and board of visitors, and monitor the extent to which these goals are being met on an annual basis.
  - For example, this could be delineation of the percentage of racial minorities, persons with disabilities etc. across students, faculty and staff groups to assess representation and compositional diversity.
  - Implement ongoing practices to assess effectiveness of programs designed to advance DEI.
- Take action in including new voices, especially minoritized staff, faculty, and student identities with executing DEI initiatives connected to the strategic plan.
  - This can be done by creating spaces to have meaningful dialogue leading to action. This may at times require facilitation by an outside person.
  - Address concerns and perceptions of retaliation by leadership, supervisors and faculty advisors. Give LFSOP members reminders of resources to address these concerns (ombudsmen/ombudsteam).

- Establish intentional recruitment practices to identify potential staff, faculty, and graduate and undergraduate student candidates from diverse communities.
  - For example, review relevant national candidate data for respective roles and positions to use as a benchmark for what the LFSOP recruitment pool should look like.
    - If LFSOP's pool is narrower than the availability data suggests, additional outreach should be conducted.
    - Examine past applicants to assess if diverse candidates were overlooked, and discuss how this might have happened and how to avoid this in the future.
- Offer specialized professional development and capacity building to persons in senior and supervisory positions on how to improve equity and equal treatment across job positions.
  - The training should be focused on raising the personal cultural competency of persons in supervisory or student advisory roles, as well as providing tools and resources to create an equitable workplace environment.
  - Staff supervisors and advisors who work closely with students should also be offered professional development and capacity building to improve equitable supervising and advising practices.
- Prioritize the development of a series of professional development learning opportunities and/or forums for students, staff, faculty and board of visitors to increase understanding and awareness of equity, diversity, inclusivity, discrimination, harassment and intimidation.
  - These professional development learning opportunities and/or forums should be conducted consistently at all levels annually.

- Potential topics could include: racial and ethnic identity; gender, gender identity and gender expression; discrimination, unconscious and implicit bias; cultural competency; and interpersonal and power differential.
- These professional development learning opportunities and/or forums should be required/highly expected for all community members in order to ensure institutional engagement and greater accountability.
- Expand awareness and understanding of the frequency and factors associated with perceived experiences, and/or observations of incidents related to discrimination and harassment, that are occurring on the IUPUI campus and take necessary steps to address these issues.
  - Having a clear understanding if similar or different issues that are occurring across the IUPUI campus and within the LFSOP community is important for addressing and preventing similar issues in the future.
- Create structured opportunities for community building and sharing across roles throughout LFSOP especially allowing for virtual options.
  - For example, engaging the community in monthly meetings around specific strategic DEI initiatives and goals.
  - Each meeting should include representation from faculty, staff, students, and other interested parties and power dynamics should be acknowledged so issues of hierarchy can be addressed and mitigated.
- Explore best practices within LFSOP and national and international academic philanthropy programs and schools that may provide tools to overcome DEI challenges.

# Conclusion and Next Steps

This initial analysis has been an important step for LFSOP in working towards developing goals for a DEI-centered strategic plan, and it reveals many helpful findings relative to perceptions, experiences and needs relative to diversity, equity and inclusion at LFSOP. This work will help to inform and build momentum towards the critical next step of providing high quality professional development, capacity building and coaching for diversity, equity and inclusion across the LFSOP community.

This DEI assessment is encouraging, in that immediate contextual themes not only emerged but were reinforced due to a level of consistency across the focus group sessions. A second phase of climate assessment surveys can provide a broader and more reliable in-depth analysis of the current climate within the LFSOP community and support in assessing strategic planning goals. This can reinforce and complement these preliminary findings and further inform the activities and resources that LFSOP will provide to the members of the community. A second phase also provides an opportunity for additional assessment of organizational/school readiness and support for DEI initiatives. All of these activities will support senior leadership and the DEI committee at LFSOP continuing to create an inclusive environment that is welcoming, equitable and reflects all members of the community in its various roles and functions. This work will also help to advance and further fulfill the diversity, equity and inclusion initiatives for the LFSOP strategic plan.



WhitworthKee Consulting

