

# Hewlett Foundation: Passive Asset Management RFP Demographic Survey

Please note this document is **not** the survey to be submitted along with the application. This is meant to show all the questions in the survey, which should be submitted via the following: <https://www.surveymonkey.com/r/AssetRFPDemographics>

## Introduction

The William and Flora Hewlett Foundation embraces the importance of and seeks to promote the values and practice of equity, inclusion, and diversity in our workforce, our culture, and our grant-making. As affirmed in our Guiding Principles, “we care about and hold these values essential both because this is the right thing to do and because it is the smart thing to do.”

To learn more about our applicant pool for the Passive Asset Management Request for Proposal (RFP), we ask you to fill out this demographic survey. **This demographic survey has no impact on current or future grants. It is intended to serve as an information-gathering exercise by which we can learn more about our potential grantee organizations.** This survey will be collected and reviewed by a third party (Hovland Consulting) and data will be aggregated for the Foundation, so to avoid any bias. The Foundation will receive the **aggregated data after making its funding decisions** related to this RFP. The survey data will not be shared publicly.

If you choose not to respond to the demographic questions, there will be a place to enter 0 in a “No response (enter 0)” category – this “no response” will count for the purposes of the mandatory response to this survey.

This [survey](#) has three parts: 1) Basics and geography, 2) Demographics overview and gender, and 3) Racial ethnic identity. Thank you for taking the time to fill out this survey. Please provide input when you submit your RFP, at the latest by March 31, 2020. Please contact Val Hovland ([val@hovlandconsulting.com](mailto:val@hovlandconsulting.com)) if you have any survey questions or problems.

## Part 1: Basics and geography

1. Organization name and contact email:
2. In what regions/countries does your organization have ongoing work? (check all that apply)

Region/Country	Ongoing work (check all that apply)
China	
Europe	
United States	
Other	

3. Please enter the specific country where your organization is headquartered.

## Part 2: Demographics overview and gender

The following questions provide an opportunity for you to report on your organization's own diversity, including that of your Board, the head of your organization (President/CEO/Executive Director), other senior staff, and other staff. Those terms are defined as follows:

- **Board members:** all active members of your board.
- **Heads of organization** (President/CEO/Executive Director): The highest leadership at your organization, be they named President, Chief Executive Officer, Executive Director, or other.
- **Senior staff:** Any person who reports directly to the head of your organization (e.g., vice president, program director).
- **Other staff:** Other employees excluding President/CEO/Executive Director and senior staff.

**Please use your most recent data, ideally captured within the last year.** If you have not conducted a voluntary organizational survey of race/ethnicity and gender in more than one year, we encourage you to undertake this effort before filling out this survey. Hewlett understands the nuances associated with collecting legally-protected demographic data and encourages groups to seek support if they have any questions about how to collect this data. For individuals who decline to state their racial, ethnic, or gender identity, please denote accordingly in the tables below ("Individuals decline to state"). If your organization does not collect this data, please complete the box marked "Unknown (data not collected)" at the bottom of the tables.

If you choose not to respond, please enter 0 in the "No response (enter 0)" category.

4. Using these definitions above, please identify for the purposes of this survey whom you are categorizing as senior staff (titles applicable to your organization):
5. Please indicate the total number of the following groups that your organization has:
  - a. Board:
  - b. Heads of organization:
  - c. Senior staff:
  - d. Other staff:



### Gender identity

For the next four questions, please indicate how many of your organization’s board members, organizational head (President/CEO/Executive Director), senior staff, and other staff members publicly self-identify as the following (CHECK ALL THAT APPLY).

Note: The gender categories below were chosen based on emerging best practices and extensive consultation with experts in this area. Though these categories were designed to be as inclusive as possible, we acknowledge that your organization may collect information on staff gender using different or more extensive standards.

We also acknowledge that many organizations may collect this information using less detailed or broader categories than those listed below. In these instances, please report counts on the categories for which you collect data—while all staff members should be accounted for in your reporting, not all gender category options need to be utilized.

6. Board

Number of:	(#)
Female/Woman	
Male/Man	
Non-binary	
Transgender	
Individuals decline to state	
Unknown/ information not collected	
No response (enter 0)	

7. Heads of organization (Pres/CEO/ED)

Number of:	(#)
Female/Woman	
Male/Man	
Non-binary	
Transgender	
Individuals decline to state	
Unknown/ information not collected	
No response (enter 0)	

8. Senior staff (excl. head of organization)

Number of:	(#)
Female/Woman	
Male/Man	
Non-binary	
Transgender	
Individuals decline to state	
Unknown/ information not collected	
No response (enter 0)	

9. Other staff

Number of:	(#)
Female/Woman	
Male/Man	
Non-binary	
Transgender	
Individuals decline to state	
Unknown/ information not collected	
No response (enter 0)	

### Part 3: Racial ethnic identity and headquarters

Based on where your headquarters is located, we have US- and Europe-specific ethnicity demographic questions. We will not ask racial/ethnic demographics of organizations outside of US or Europe.

10. In what region/country is your organization headquartered?

Region/Country	Headquarters	Notes
China		We will not ask racial/ethnic demographics, only gender demographics
Europe		The next questions ask about Europe-specific ethnicity demographics.
United States		The next questions ask about US-specific ethnicity demographics.
Other		We will not ask racial/ethnic demographics, only gender demographics

For organizations headquartered in the US or Europe, for the next four questions, please provide the NUMBER of people who publicly self-identify as the following categories (FILL OUT ALL THAT APPLY). Note: The race/ethnicity categories below were chosen to be consistent with existing sector - relevant standards in the United States or the United Kingdom. We acknowledge that your organization may collect information on staff race/ethnicity using different or more extensive standards.

We also acknowledge that many organizations may collect this information using less detailed or broader categories than those listed below. In these instances, please report counts on the categories for which you collect data—while all staff members should be accounted for in your reporting, not all race/ethnicity category options need to be utilized.



**Racial/ethnic identity (United States headquarters)**

11. Board

Number of:	(#)
Asian/Asian-American	
Black/African-American	
Hispanic/Latino/Latina	
Native American/American Indian/Alaska Native/Native Hawaiian/First Nation	
White	
Multiracial or multiethnic (2+ races/ethnicities)	
Individuals decline to state	
Other	
Unknown/ information not collected	
No response (enter 0)	

12. Heads of organization (Pres/CEO/ED)

Number of:	(#)
Asian/Asian-American	
Black/African-American	
Hispanic/Latino/Latina	
Native American/American Indian/Alaska Native/Native Hawaiian/First Nation	
White	
Multiracial or multiethnic (2+ races/ethnicities)	
Individuals decline to state	
Other	
Unknown/ information not collected	
No response (enter 0)	

13. Senior staff (excl. head of organization)

Number of:	(#)
Asian/Asian-American	
Black/African-American	
Hispanic/Latino/Latina	
Native American/American Indian/Alaska Native/Native Hawaiian/First Nation	
White	
Multiracial or multiethnic (2+ races/ethnicities)	
Individuals decline to state	
Other	
Unknown/ information not collected	
No response (enter 0)	

14. Other staff

Number of:	(#)
Asian/Asian-American	
Black/African-American	
Hispanic/Latino/Latina	
Native American/American Indian/Alaska Native/Native Hawaiian/First Nation	
White	
Multiracial or multiethnic (2+ races/ethnicities)	
Individuals decline to state	
Other	
Unknown/ information not collected	
No response (enter 0)	



**Racial/ethnic identity (Europe headquarters)**

15. Board

Number of:	(#)
Arab	
Asian/Asian-European	
Black/African/Caribbean/Black-European	
White	
Mixed / Multiple ethnic groups	
Individuals decline to state	
Other	
Unknown/ information not collected	
No response (enter 0)	

16. Heads of organization (Pres/CEO/ED)

Number of:	(#)
Arab	
Asian/Asian-European	
Black/African/Caribbean/Black-European	
White	
Mixed / Multiple ethnic groups	
Individuals decline to state	
Other	
Unknown/ information not collected	
No response (enter 0)	

17. Senior staff (excl. head of organization)

Number of:	(#)
Arab	
Asian/Asian-European	
Black/African/Caribbean/Black-European	
White	
Mixed / Multiple ethnic groups	
Individuals decline to state	
Other	
Unknown/ information not collected	
No response (enter 0)	

18. Other staff

Number of:	(#)
Arab	
Asian/Asian-European	
Black/African/Caribbean/Black-European	
White	
Mixed / Multiple ethnic groups	
Individuals decline to state	
Other	
Unknown/ information not collected	
No response (enter 0)	

We appreciate your responses. This data will have no impact on current or future grants.

