



# On-ramps for Every Traveler: Enhancing Impact through Diversity, Equity, and Inclusion

Presented by: Paula Dressel, JustPartners, Inc.



# Welcome from Public Interest Projects



**Melinda Fine, Ed.D.**

Director of Education and  
Director of Communities  
for Public Education  
Reform (CPER)



Public Interest Projects helps donors develop innovative grantmaking strategies.

We create inspired spaces and opportunities for funders to maximize the impact of their grants, leverage their resources, and meet other like minded donors with the goal of thinking more creatively about the philanthropic sector's role in advancing social change.

# PIP – D5 Webinar Series

**All start at 1:00 p.m. EST**

**January 23:** “D5: Advancing Issues that are at the Core of All Communities and All Philanthropy” – *Slides available at [www.publicinterestprojects.org](http://www.publicinterestprojects.org)*

**March 27:** “Elusive Philanthropy Data: Opportunities and Barriers for Collecting Data to Tell Philanthropy’s Full Story”

**April 17:** “Commitment from the Top: The Role of the CEO Commitment in Advancing Diversity, Equity & Inclusion”

**May 22:** “Career Trajectories of People of Color in Philanthropy”

**Email to register: [homar@d5coalition.org](mailto:homar@d5coalition.org)**

**Visit <http://www.publicinterestprojects.org>  
for PowerPoints from the presentations**

# Before we begin...

- **Please mute your lines**
- **Please use the chat box to ask questions**
- **At the conclusion, please take the time to fill out the survey**
- **We are recording this webinar to share online at [www.publicinterestprojects.org](http://www.publicinterestprojects.org) and [www.d5coalition.org](http://www.d5coalition.org)**



Kelly Brown  
Director, D5 Coalition

# Imagine philanthropy...

- **achieves lasting impact** by drawing on the power of diverse staffs and boards
- **forges genuine partnerships** with diverse communities
- **increases access** to opportunities and resources

**for all people.**

# Four Big Goals



1. Recruit diverse **leaders** for foundations—including CEOs, staff, and trustees



2. Increase **funding** for diverse communities and ensure that foundations offer all constituencies equal opportunity to access the resources they need



3. Improve **data** collection and transparency so we can measure progress



4. Identify the best **actions** we can take in our organizations to advance diversity, equity, and inclusion





Paula Dressel, JustPartners, Inc.

JPI, a nonprofit consulting firm, advances strategies for measurable, sustainable social change and clients' improved mission performance.

# **Policies, Practices & Programs (PPP) to Advance DEI**

*Insights from a recent scan of policies, practices, and programs can inform the substance of your efforts and conversations with colleagues.*

# Key Finding

Advancing DEI may be an issue of “why-to” [*message*] and “where to begin” [*identifying the next PPP*].



# Scan Methodology

Snapshot of the field completed Fall, 2012

200+ bibliographic resources consulted

Emphasis on developments of past 5 years

In-depth interviews with 7 foundations

Analysis of information by framework described

Compilation of tools, programs, models, and guidance for action

Guidance/input from D5 Staff and Advisory Group



# Focus of the Scan

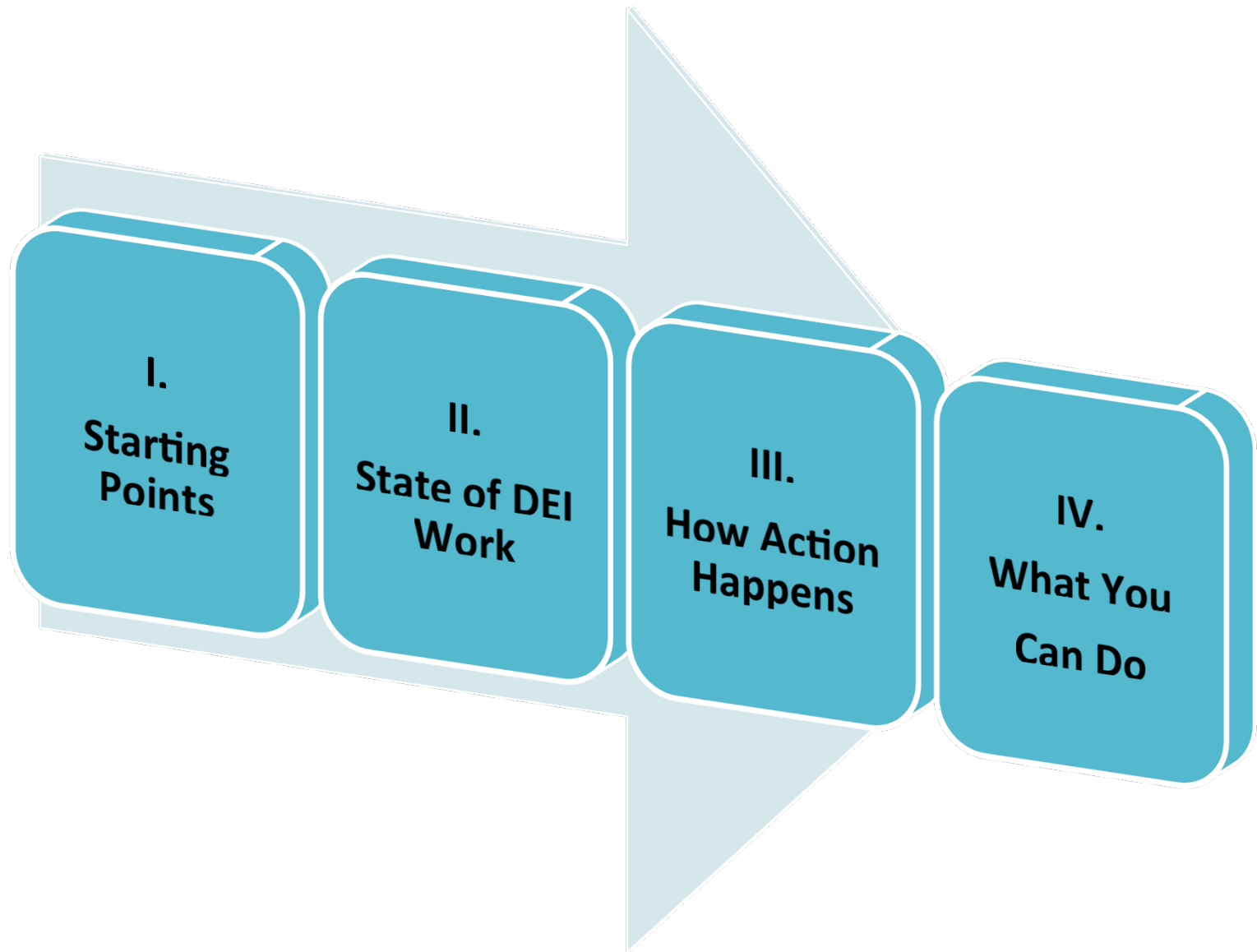
Disability

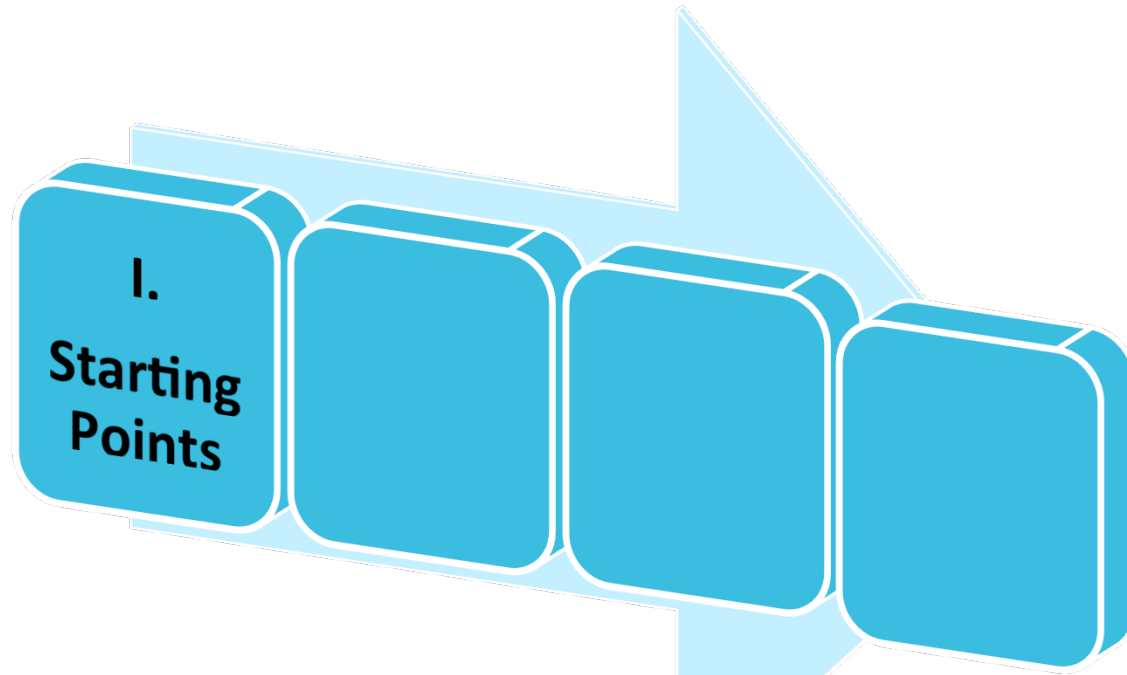
Gender

LGBT

Race

# Steps to Drive Action





*"...(O)ne of the reasons that these conversations tend to be frustrating and unproductive is that they lack a clear framework, a starting point that emphasizes **consensus around definitions** of terms and concepts, and most importantly, a **clear set of goals**."*

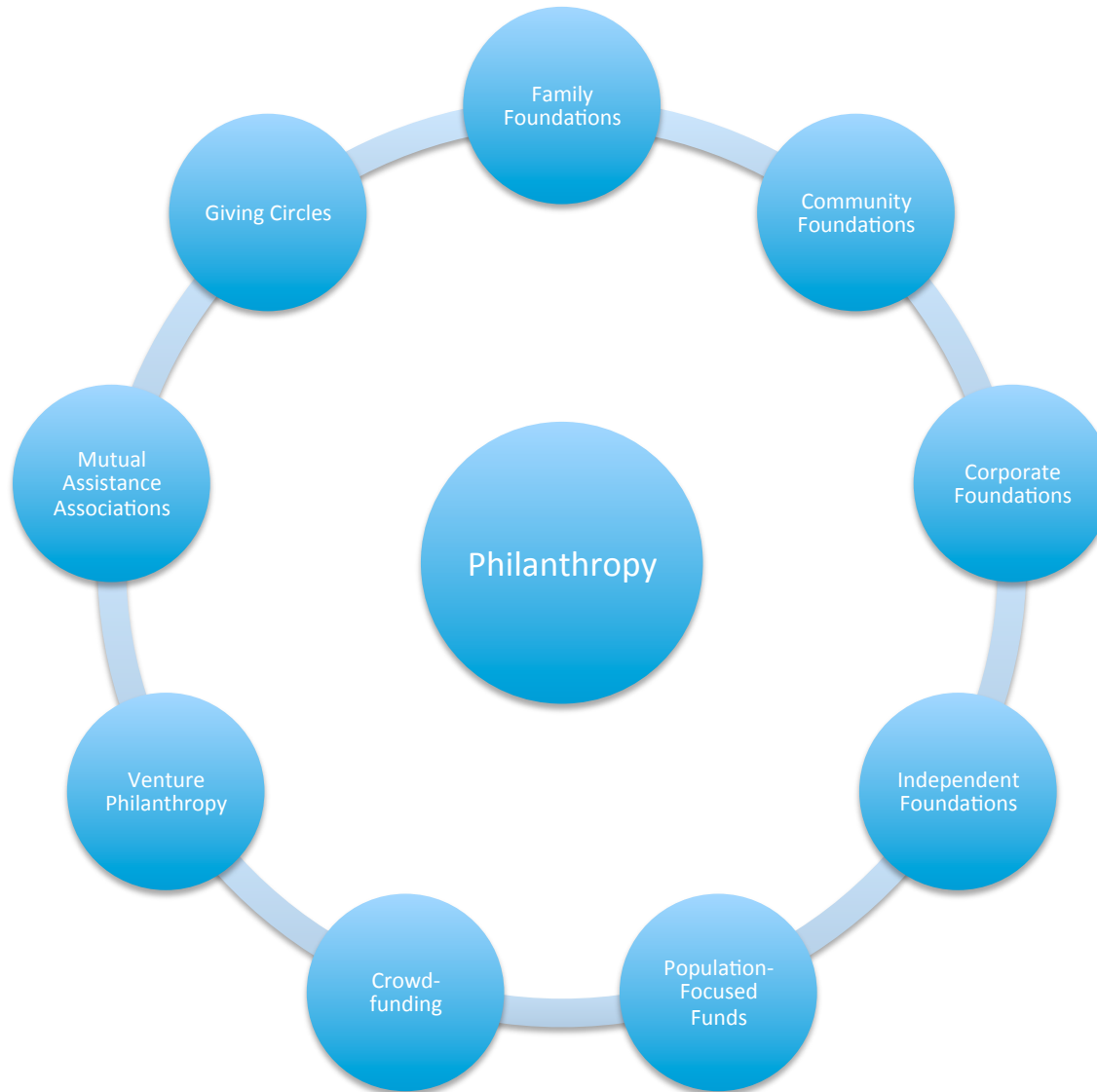
–Program Officer, Community Foundation



# Distinctions Among Diversity, Inclusion, Equity



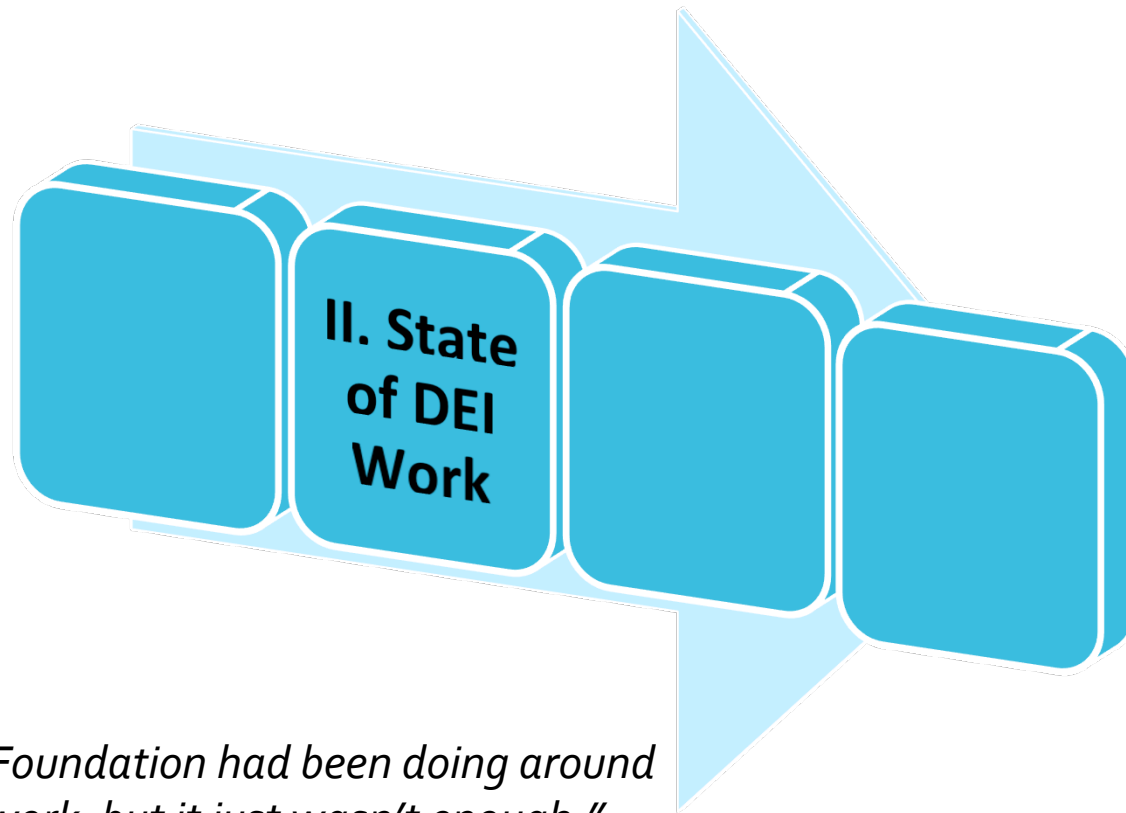
# Philanthropy Is a Diverse Enterprise





# Framework for Organizing the Scan

<b>Organizational features that advance and sustain DEI goals</b>	<b># of Indicators</b>
Has the organization made an expressed commitment to DEI?	3
Has it authorized DEI in organizational policy?	6
Has it implemented DEI practices in its operations?	11
Has it implemented DEI practices in grant-making/other programmatic areas?	11
Does it utilize accountability mechanisms to monitor DEI?	11



*"The work that the Foundation had been doing around diversity was good work, but it just wasn't enough."*

–Program Officer, Family Foundation



# Nine Key Conclusions About DEI in Philanthropy

1. Three models for DEI change are represented in the literature.
2. Activity appears greatest around diversity and inclusion.
3. Equity requires greater *intentionality* by philanthropy.
4. Practice is lifted up more than policy in the literature.
5. Accountability to promote and sustain change appears lacking.
6. A handful of foundations is trying to put the DEI pieces together.
7. “On-ramps” for DEI work are abundant.
8. Tools and programs are available to guide and support action.
9. Models of DEI work abound across foundation types.



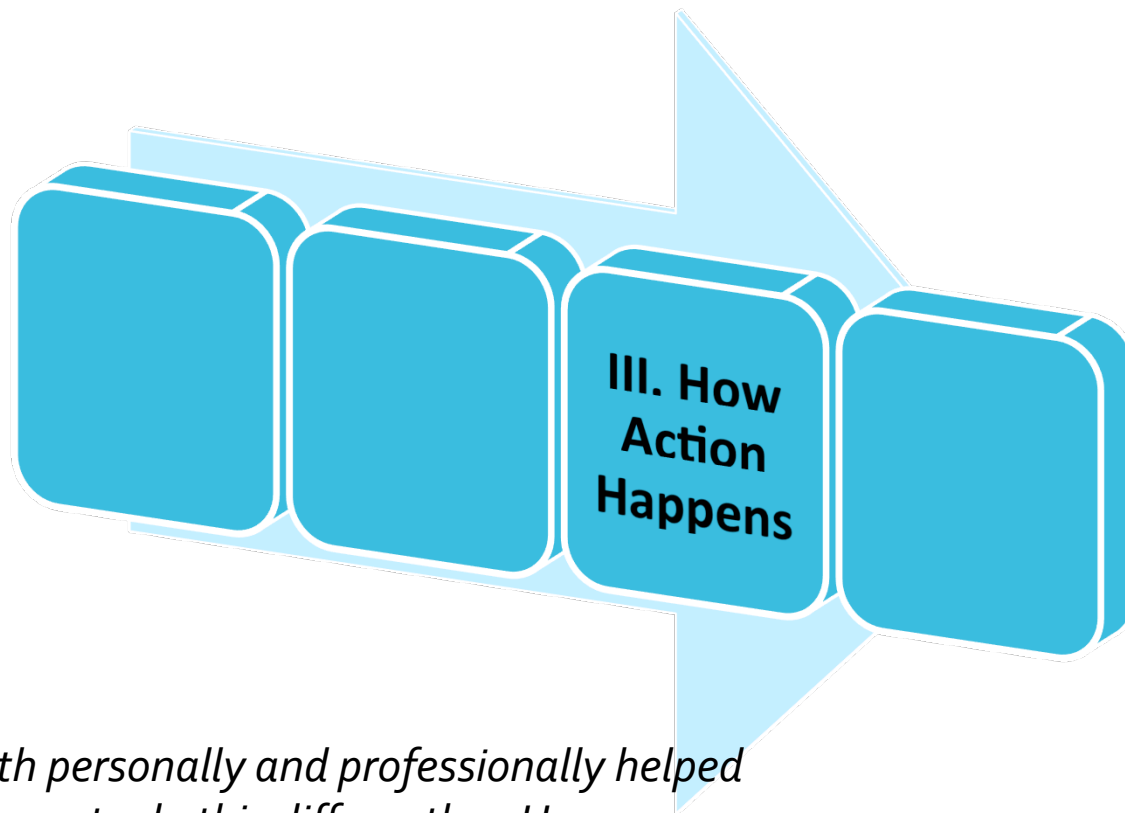
## The Bottom Line

Considerable inroads are being made by philanthropy around issues of diversity **practice**, especially as it pertains to Board, staff, and donors, and mainly focused on race/ethnicity.

Challenges include the need to achieve cross-cutting **equitable results**, sustain DEI through **policy**, and undertake systematic organizational **accountability** for DEI.

# Three Models for DEI Change

- **Model 1:** Diversifying personnel and advancing inclusion for *change within foundations*
- **Model 2:** Diversifying/expanding philanthropic participation (who *gives* in a formal way) and diversifying/targeting the philanthropic focus (who *gets* in a formal way) in order to *change philanthropy as a sector*
- **Model 3:** “Hardwiring” equity into institutional policy and practice to *change operational and programmatic philanthropic outcomes*



*“Her background both personally and professionally helped her understand we have to do this differently... Her **experiences helped her understand** that race and gender had to be at the core of the work.”*

–Executive Director, Family Foundation





# What Animates DEI Work

Mobilizers

Missions

Money

Moments

Movements



# What's Important at the Start

Leadership

Broadly embraced message

Shared definition and clear point of view

Openness to self-reflection, learning, data

Manageable place to anchor commitment in  
everyday work

Early positive reinforcement

External supports



# What DEI Work Requires to Be Sustained

Good results

Ongoing and broadening leadership commitment

Growing board, staff, organizational competencies

“Hard-wired” institutional commitment to DEI

Systematic data for tracking impact

# Hard-Wire Institutional Commitment in Policies

## In **key organizational documents and processes:**

- The vision, mission, and values statements
- Each successive strategic plan
- Organizational policies, practices, and protocols such as
  - Job descriptions
  - Staffing patterns
  - New personnel orientations
  - Performance measures
  - Other accountability mechanisms
  - Investment strategies
  - Review of external communications
  - Data collection



"By doing not only what is **right**, but also what is **smart**, we can get the change and the world we all want to see."

–Kelly Brown, Director, D5 Coalition



# Five Steps to Successful DEI Implementation

- ① Get buy in from leadership
- ② Establish clear definitions and goals tied to the foundation's mission
- ③ Consult with peers or infrastructure groups to get ideas and tools
- ④ Write down policies and practices
- ⑤ Collect data to measure progress



## Discussion

What have you learned that would be useful to people you are trying to persuade?

What do think is the most challenging situation you will encounter while trying to convince others to take action? How can this help?

Imagine someone is persuading you to take a step to advance DEI in your institution. What are you most anxious about?



Visit [www.D5coalition.org](http://www.D5coalition.org):

- Access the complete scan and DEI organizational assessment
- Access a wide range of supportive resources
- Learn about and get involved with **Take 5**
- Sign-up for our mailing list, newsletter and e-alerts

Visit [www.publicinterestprojects.org](http://www.publicinterestprojects.org):

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# THANK YOU

For follow-up inquiries or to register for future webinars, please contact Hafizah Omar with the D5 Coalition at [homar@d5coalition.org](mailto:homar@d5coalition.org).