



Growing **diversity**,
equity, and **inclusion**
in philanthropy

D5 Coalition: Fueling a Movement



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.

Diversity, equity, and inclusion help foundations...

- ➔ Advance the common good & achieve greater impact
- ➔ Keep up with changing consistencies
- ➔ Increase effectiveness

Better Together

D5 Funders

The California Endowment
Annie E. Casey Foundation
Marguerite Casey Foundation
Lloyd A. Fry Foundation
Evelyn and Walter Haas, Jr. Fund
Robert Wood Johnson Foundation
W.K. Kellogg Foundation
Jessie Smith Noyes Foundation
David and Lucile Packard Foundation
The Prudential Foundation
Rockefeller Brothers Fund
The Rockefeller Foundation
Rosenberg Foundation

And Growing...

D5 Leadership Team

Maricela Espinoza-Garcia, AriGioio Communications
Carly Hare, Native Americans in Philanthropy
Mae Hong, Rockefeller Philanthropy Advisors
Lawrence McGill, Foundation Center
Mary O'Neill, Forum of Regional Associations
Kristopher Smith, Funders' Network for Smart Growth and Livable Communities
Ericka Plater-Turner, Council on Foundations
Sylvia Zaldivar, Maestro Cares Foundation

Four Big Goals



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



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



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



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

Four Big Changes by 2015

1. Diverse leaders
2. More funding
3. Better data
4. Voluntary action

2015 GOAL:

- New foundation CEO, staff, and trustee appointments more closely reflect U.S. demographic trends

WORK TO DATE:

- Leadership networks in Chicago, Michigan, Pacific Northwest, Philadelphia
- Study of career paths of people of color in philanthropy
- Directory of pipeline programs

WORK UNDERWAY:

- Engagement of search firms and HR professionals
- Census of diverse trustees



Four Big Changes by 2015

1. Diverse leaders
2. More funding
3. Better data
4. Voluntary action

2015 GOAL:

- Annual funding for diverse communities increases substantially

WORK TO DATE:

- Donor Gatherings in Chicago and LA
- Population-Focused Funds (PFF) Directory
- PFF Analysis report and convening
- “We Are Philanthropy” film series

WORK UNDERWAY:

- PFF Analysis strategic dissemination
- “We Are Philanthropy” expansion and strategic dissemination
- LGBTQ donor research

Four Big Changes by 2015

1. Diverse leaders
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WORK TO DATE:

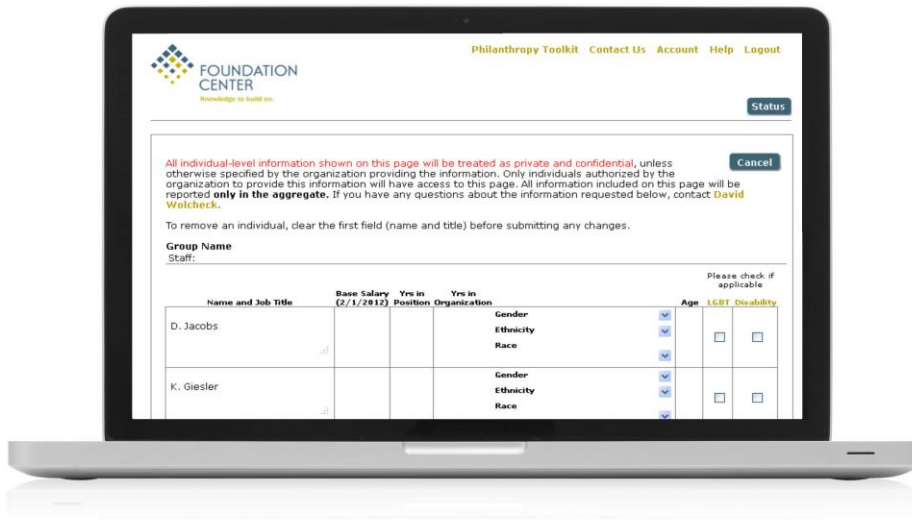
- Internal data collection profile piloted
- “Insights on Diversity” research projects launched

2014-2015 PLANS:

- Internal data collection expanded
- Non profit data collection system launched
- Constituent and grants data collection underway

2015 GOAL:

- Philanthropy has the research capacity to be more transparent about progress on DEI



Foundation Center Foundation Profiles “Get on the Map” Campaign

GuideStar Exchange Demographic Module

Organizational Demographics

We live and work in a diverse world. In an era of infused with data, nonprofits and funders have an opportunity to use data to work more effectively. In order to support nonprofits and gain valuable insight for the sector, GuideStar worked with D5-- a five-year initiative to advance diversity, equity, and inclusion in philanthropy—in creating this questionnaire.



We would like to emphasize that each of the following questions is voluntary (1). We encourage you to view this as a tool for sharing whatever data you would like to share, not a survey where you must answer every question.

This questionnaire was developed with input from a range of organizations. See below for more information.

When collecting identity information, please be sure all staff and volunteers have the opportunity to self-identify on the various demographic categories anonymously. It is a best practice to always provide a “decline to state” option. No person can legally be required to complete any survey related to identity. ([Click here for more guidance on responsible data collection](#))

How many Board Members, Staff Members (full and part-time), Senior Staff, and Volunteers does your organization have?

Board Members	Staff Member (full time)	Staff Members (part time)	Senior Staff (full time)	Volunteer
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Total

Gender Identity

How many Board Members, Staff Members (full and part-time), Senior Staff, and Volunteers in your

Four Big Changes by 2015

1. Diverse leaders
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2015 GOAL:

- More foundations take meaningful action to address diversity, equity, and inclusion issues in their organizations

WORK TO DATE:

- Message for the field on DEI developed
- Comprehensive scan of best programs, policies, and practices (PPP)

WORK UNDERWAY:

- PPP scan dissemination
- Communications trainings
- Research on DEI consultants and resource development
- Affinity group engagement

Policies, Practices, and Programs Resource Guide

The following resources have proved useful for foundation leaders who have taken steps to advance diversity, equity, and inclusion in their institution. They are organized by task to help you: 1) make the case that DEI is important; 2) write DEI into your policies; 3) implement strong DEI practice into your programs and your operations; and 4) monitor your work to ensure accountability.

These resources and more can be found in D5's [Tools & Resources Library](#).

Making the case

▶ Crafting policy

▶ Implementing operational and programmatic practice

▶ Monitoring for accountability

Translating Complexity Into Effective Practice

Tags: action : human resources : OMG Center : policies and practices

Translating
Complexity
Into Effective
Practice

This 2013 issue brief by philanthropic advisor OMG Center for Collaborative Learning describes the process undertaken by this 30-year old consulting practice to institutionalize organizational policies that build and support staff to carry out work that is committed to diversity, equity, and inclusion.



D5 Work with Regionals

7 Original Regional Assoc. Partners

Philanthropy Northwest
Philanthropy New York
Council of Michigan Foundations
Ohio Grantmakers
Minnesota Council of Foundations
Donors Forum
Associated Grantmakers

Emerging Partners

**Grantmakers of Oregon and
Southwest Washington
Tampa Bay Funders
Philanthropy Southwest
Northern CA Grantmakers**

And counting.....

Range of work

- Major Research
- Member programs and presentations
- Communications trainings
- Data Collection Pilots
- Leadership Networks



Discussion

DEI Traction in Tampa – Table Talk

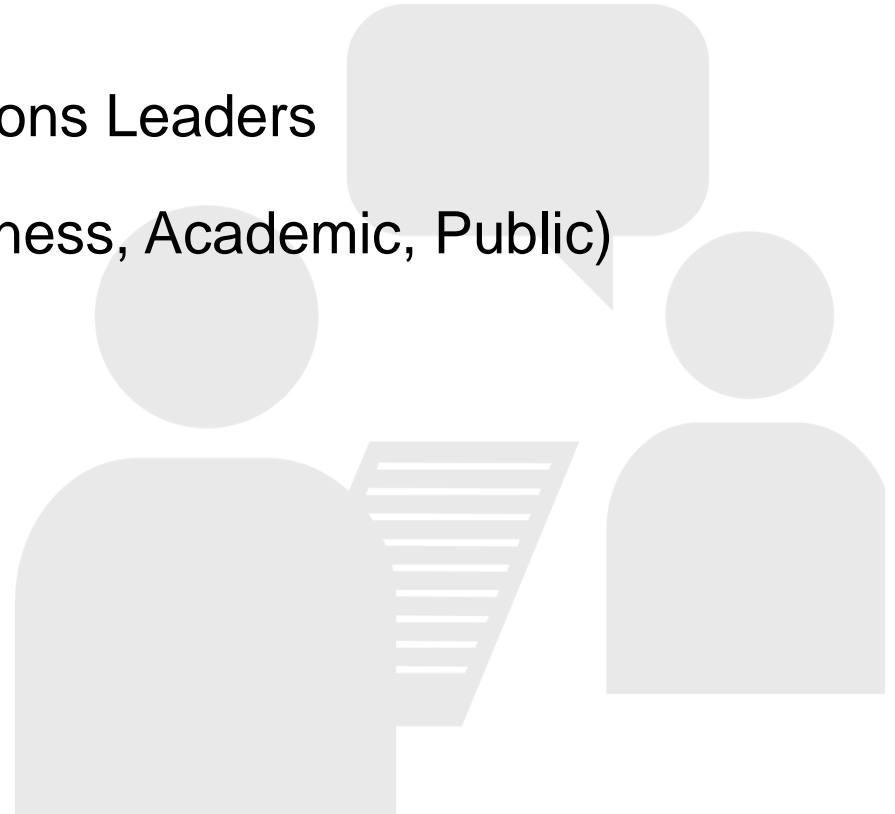
- What are the pressing diversity, equity and inclusion issues for Tampa funders?
- What are the perceived barriers?



Inspiring Action: Motivating Message & Take 5 Campaign

Research-Based Message & Strategy

- 7 D5 Foundation & Infrastructure Organization Leaders
- 6 Philanthropic Thought Leaders
- 5 Non-D5 Foundation Leaders
- 4 Non-D5 Infrastructure Organizations Leaders
- 3 Non-Philanthropic Leaders (Business, Academic, Public)



Audience Segments

Champions:

Fatigued Fighters

Emerging Champions:

Recent Enthusiasts

Persuadables:

Heartfelt Pragmatists

Skeptics 1:

Pro-Diversity Regulators

Skeptics 2:

Rugged Individualists

Winning Words

Common good *Universal value*

Advancing *Suggests progress*

Greater impact *Better advance the mission*

Constituencies *Relevant to all foundations*

Perspectives *Expansive, suggests effectiveness*

Growing movement *Part of something larger*

New voices *Stay ahead of the curve*

Effective *Ties to mission, not good nature*

Opportunities *Makes equity less scary*

TAKE5

A movement to take action

500
actions



100 champions
commit to Take 5



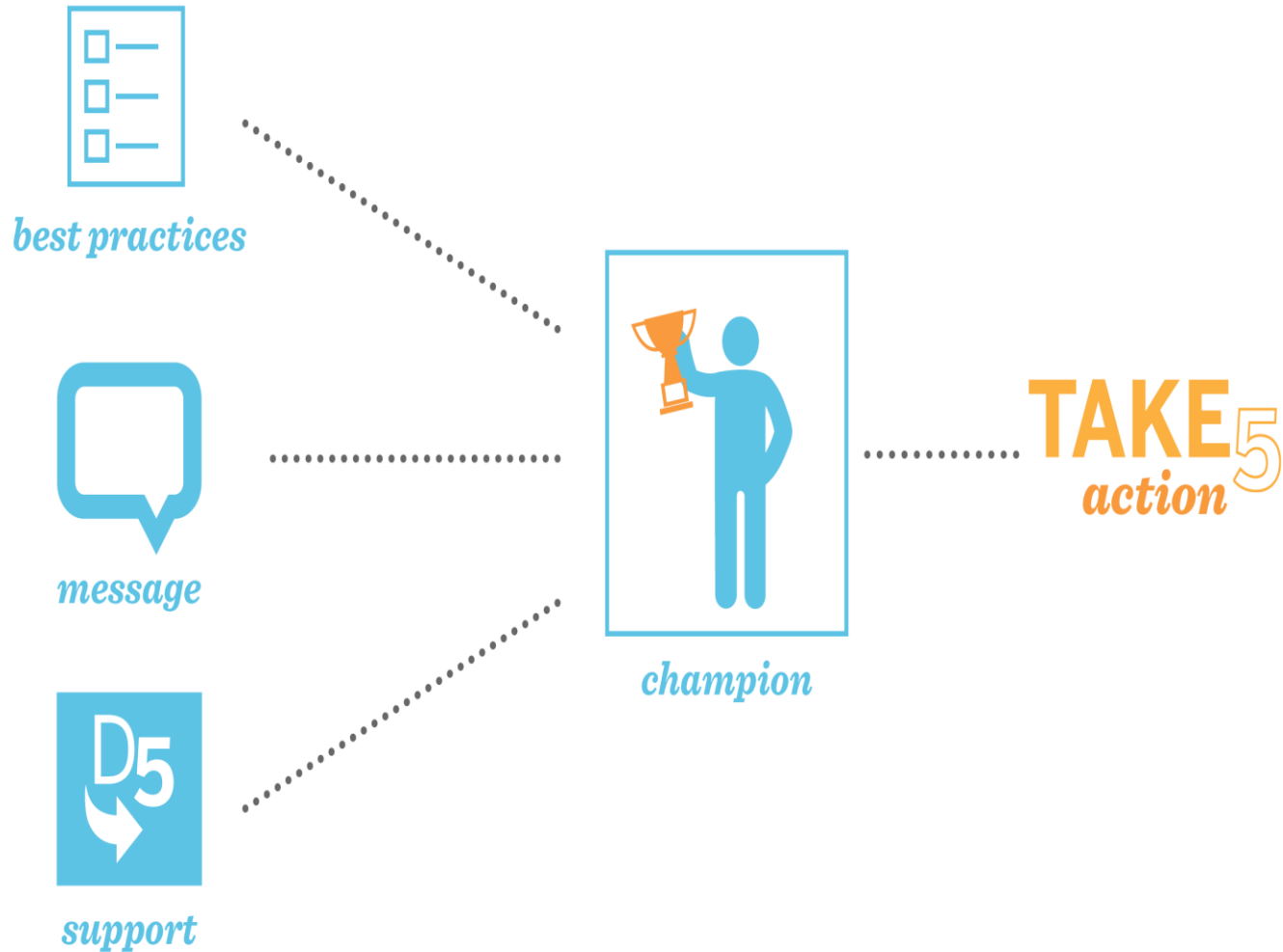
Each champion
takes 5 actions to
advance DEI



D5 plays the role
of helpful guide



Take 5: Encouraging & Supporting Action



DEI Traction in Tampa – Table Talk

- Where are the opportunities to move work on these issues?
- Who are the allies?



Things you can do

1. Consider joining Take 5 Campaign to get support to further specific action within your foundation
2. Look at resources and trainings to go deeper on data, equity, leadership or communications
3. Urge your foundation to participate in data collection efforts such as Get on the Map and the GuideStar Exchange to strengthen and streamline philanthropy's capacity to understand its impact
4. Brainstorm potential non-traditional allies and engage them in strategic conversations
5. Take the next step.....

**Learn more and access more resources at
www.d5coalition.org**



STRUCTURING THE CONVERSATION

1

Introduce D5 and say why this work is important to you personally.

D5 is a growing collaboration of a variety of foundations, associations, and other organizations dedicated to advancing diversity, equity, and inclusion in philanthropy. This work is important to me because _____

2

Define diversity, equity, and inclusion.

To be clear about what I mean by diversity, equality, and inclusion: diversity is bringing those with a unique perspective or life experience to the decision-making table, focusing particularly on racial and ethnic groups, LGBT people, people with disabilities, and women. Equity is promoting justice, impartiality, and fairness within the procedures and processes of institutions or systems, as well as the distribution of resources. Inclusion is ensuring diverse individuals are able to participate fully in the decision-making processes of an organization.

3

Ask them what they've done so far.
Use the next page as a guide.

4

Brainstorm possible next steps.
Use the action card to generate ideas and brainstorm ways around challenges.

5

Seek a commitment
Let us know whom you talked to and what they committed to.
Email: Judi Powell at judi@justpowerllc.com.



GUIDING QUESTIONS

1

Build on Success

What has your foundation done to advance DEI? What would you like to do next?

2

Identify



What can you do to advance diversity, equity, and inclusion at your foundation?

NAME

TITLE

ORGANIZATION

EMAIL

I COMMIT TO:

4

Offer Assistance

How could I, or others working on this issue, help?

Create a Plan to Tackle This Challenge

How can you get these challenges resolved? What would you need first?

ACTION MEMORANDUM

While a key goal of your conversations will be to identify to the person you're talking with, here are a few ideas for action to advance DEI in their organizations.

- Schedule a formal conversation, such as inviting DEI on the agenda of an upcoming board or staff meeting
- Conduct a DEI organizational audit and set goals based on the results
- Make your commitment to DEI explicit in mission and external communications
- Improve your DEI data collection and be transparent about the results
- Make DEI an explicit criterion for recruiting staff: board members, consultants, or investment managers
- Participate in a training, such as a cultural competency training, conducted by D5 or a partner organization
- Make a grant to support the work of an organization working to advance DEI
- Make DEI an explicit part of your grantmaking policies
- Create or contribute to a population-focused fund
- Recruit diverse donors