



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

D5 Coalition: In the Home Stretch of 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.

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

D5 Leadership Team

Maricela Espinoza-Garcia, AriGoio Consulting
Carly Hare, Joint Affinity Groups
Mae Hong, Rockefeller Philanthropy Advisors
Lawrence McGill, Foundation Center
Mary O'Neill, Forum of Regional Associations of Grantmakers
Kristopher Smith, Funders' Network for Smart Growth and Livable Communities
Sylvia Zaldivar, Consultant

And Growing...

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

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

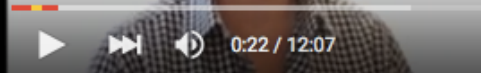
WORK TO DATE:

- 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” strategic dissemination
- LGBTQ donor research

“We Are Philanthropy”



0:22 / 12:07



Four Big Changes by 2015

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

2015 GOAL:

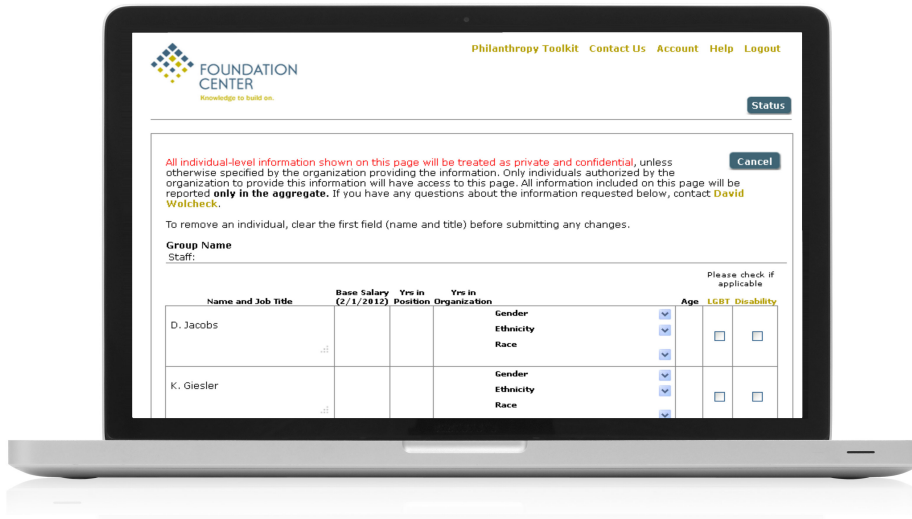
- Philanthropy has the research capacity to be more transparent about progress on DEI

WORK TO DATE:

- Internal data collection profile piloted
- “Insights on Diversity” research projects completed
- Staff and Board demographic data collection system launched

WORK UNDERWAY:

- Internal data collection expanded
- Constituent and grants data collection strengthened



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
---------------	--------------------------	---------------------------	--------------------------	-----------

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
2. More funding
3. Better data
4. Voluntary action

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

WORK UNDERWAY:

- Scan of Policies, Practices, Programs dissemination
- Communications trainings
- Issue-based 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.



**Inspiring Action:
Motivating Message
for Targeted Audience**

Audience Segments

Champions:

Fatigued Fighters

Emerging Champions:

Recent Enthusiasts

Persuadables:

Heartfelt Pragmatists

Skeptics 1:

Pro-Diversity Regulators

Skeptics 2:

Rugged Individualists

Into 2016 and beyond...

1. Focused effort to understand how best to engage trustees and CEOs in this work
2. Intensive support for efforts to engage foundations in effective demographic data collection, analysis and transparency
3. Encourage more action by foundations to examine practices, policies and organizational culture, supported by tools and connections to peers and allies
4. Identify areas for more strategic research, such as:
 - Role of Executive Search firms in expanding or limiting opportunities for diverse staff and leadership
 - Strategies for effectively engaging and assessing facilitative partners to help with internal change efforts

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

Discussion