



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

Advancing Diversity, Equity, and Inclusion

Message Manual for the Field





USING THIS MANUAL

This manual is a content guide for use by leaders in philanthropy—including infrastructure organizations, foundation leaders, thought leaders, and philanthropic influentials. It will help you communicate with a variety of audiences about the importance of advancing diversity, equity, and inclusion (DEI) in philanthropy—and how it can help your organization better achieve its mission. The language in this manual can be used as a reference or as a template for preparing materials and presentations.

The approach taken to create this manual draws on well-established models and best practices employed in marketing and communications for persuading and motivating people through language that not only informs, but also inspires. This language is intended to help us explain the importance of diversity, equity, and inclusion to people who believe that it is a “nice to have,” but are not convinced it will increase their foundation’s effectiveness. Using this kind of language in all of our communications will help us deliver a consistent and compelling message that will build support for our work.

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WHAT IS DIVERSITY, EQUITY, AND INCLUSION?



Diversity

The word “diversity” can mean different things to different people. We’ve defined it broadly to encompass the demographic mix of a specific collection of people, taking into account elements of human difference, but focusing particularly on:

- Racial and ethnic groups: Asian Americans and Pacific Islanders, Hispanics/Latinos/Latinas, African Americans and blacks, and American Indians and Alaska Natives
- LGBT populations
- People with disabilities
- Women

D5 uses this broad definition of diversity for three reasons. First, this is what diversity looks like in the 21st century. Second, our definition encompasses populations that historically have been—and remain—underrepresented in grantmaking and among practitioners in the field, and marginalized in the broader society. Third, to be a national leader, organized philanthropy must get in front of diversity, equity, and inclusion issues and do so in a comprehensive way. We acknowledge and respect that this is one of many ways to define diversity, a concept that can encompass many other human differences as well.

Equity

Improving equity is to promote justice, impartiality, and fairness within the procedures, processes, and distribution of resources by institutions or systems. Tackling equity issues requires an understanding of the underlying or root causes of outcome disparities within our society.¹

Inclusion

Inclusion refers to the degree to which diverse individuals are able to participate fully in the decisionmaking processes within an organization or group. While a truly “inclusive” group is necessarily diverse, a “diverse” group may or may not be “inclusive.”²

1. National Academy of Program Administrators, freedictionary.com.

2. *Benchmarking Diversity: A First Look at New York City Foundations and Nonprofits*, Foundation Center, 2009.

HOW DEI CONTRIBUTES TO IMPACT

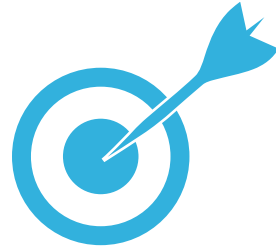
The formula below represents how diversity, equity, and inclusion contribute to impact—using key language and ideas that will motivate audiences to support diversity, equity, and inclusion—and inspire them to take action.



DIVERSE PERSPECTIVES

Talking about diversity in terms of perspectives helps people intuitively understand how advancing diversity and inclusion can lead to better problem-solving.

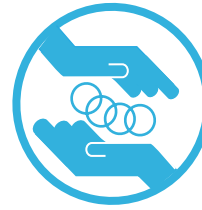
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GREATER EFFECTIVENESS

Linking diversity, equity, and inclusion to more effectively advancing their unique mission is critical to building support and inspiring action.

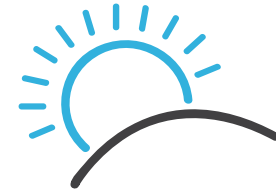
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MORE OPPORTUNITIES FOR OUR CONSTITUENCIES

Creating “opportunities” for our constituencies describes equity in a way that is readily understood and supported.

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BETTER ADVANCE THE COMMON GOOD

The “common good” is a universal value that can help all foundations connect to this cause.

DIVERSITY, EQUITY, AND INCLUSION NARRATIVE

This narrative about advancing diversity, equity, and inclusion employs themes, words, and phrases strategically selected based on their power to motivate philanthropic leaders to support this cause. The language in this message is based on interviews with a broad spectrum of leaders from philanthropy, business, academia, and public policy. It has been vetted with leaders in the field of philanthropy committed to DEI—including foundation leaders, and members of joint affinity groups, regional associations, and other infrastructure organizations.

Those of us in philanthropy have dedicated ourselves to promoting the common good. Advancing diversity, equity, and inclusion in our organizations and grantmaking helps us live up to our values and achieve greater impact.

Our constituencies, from the communities we serve to our partners in the business, government and nonprofit sectors, are becoming increasingly diverse. We need to understand and reflect this rich variety of perspectives in order to achieve greater impact.

Advancing diversity, equity, and inclusion is hard, but leaders in philanthropy have a track record of tackling many of our country's toughest challenges—and we again have an opportunity to lead the way.

To meet this challenge, philanthropic, community, and thought leaders are all coming together in an ambitious effort. We are a growing collaboration of foundations large and small, individual donors, regional and national associations, and organizations that focus on diverse communities. Together, we are a powerful, national network with the potential to impact philanthropy at every level.

We are part of a growing movement in philanthropy to ensure that those who have been historically excluded—women, people of color, people with disabilities, and the LGBT community—are at the decision-making table and reflected in our portfolios. We are working to:

- Recruit diverse leaders for foundations—including CEO, staff, and trustees;
- Identify the best actions we can take in our organizations to advance diversity, equity, and inclusion;

- Increase funding for diverse communities and ensure that foundations offer all constituencies equal opportunity to access the resources they need;
- Improve data collection and transparency so we can measure progress.

By bringing new voices and expertise to the table, we have the potential to make our foundations more effective at advancing the common good. Diversity and inclusion can help our foundations better identify creative solutions to our internal challenges, and those faced by the communities we serve. And thinking about equity in our grantmaking can help us create opportunities for all communities to thrive.

How can greater diversity, equity, and inclusion in your foundation and funding portfolio enhance your impact? Commit to an action plan for your foundation's hiring, grantmaking, or data collection.

Go to D5coalition.org for ideas and inspiration.

WINNING WORDS

These are key words and phrases that underpin an effective narrative for describing diversity, equity, and inclusion in a meaningful, inspiring way.

WINNING WORD	BENEFIT
Common good	It is important for all foundations to be able to see themselves as part of this effort. The “common good” is a universal value that all foundations can connect to.
Advancing	Advancing is a strong action word that shows progress, without sounding like we are promoting ideas that we are not also dedicated to living up to ourselves.
Diversity, equity, inclusion (DEI)	Diversity, equity, and inclusion are what we are striving to advance. Greater diversity, equity, and inclusion will strengthen the field of philanthropy and increase our impact in our communities.
Greater impact	“Greater impact” is a key goal for foundation leaders. While many may appreciate the moral values behind DEI, they want to know that advancing DEI in their organization will help them better achieve their mission.
Constituencies	“Constituencies” is an empowering way to refer to the people we serve. It also ensures that this language is relevant to all foundations—because every foundation has a constituency, no matter how varied they are.
Perspectives	Emphasizing the “variety of perspectives” brought to the table can help people intuitively understand how increasing diversity can improve effectiveness.
Growing movement	People have been working to advance diversity for decades, so it is important to renew people’s energy and urgency by emphasizing that D5 is a growing movement of leaders.
New voices and expertise	Highlighting the tangible benefits of having diverse people at the table motivates people to support action to advance diversity—because they can more easily picture how it will strengthen their organization.
Effective	Philanthropic leaders strive to be effective at advancing their missions. Linking DEI to effectiveness can help convince them of its value.
Opportunities	Defining equity as creating “opportunities for our constituencies”—rather than redistributing resources—helps people understand why it is important and more readily support it.

THE NARRATIVE EXPLAINED

Those of us in philanthropy have dedicated ourselves to promoting the **common good**. Advancing **diversity, equity, and inclusion** in our organizations and grantmaking helps us live up to our values and achieve **greater impact**.

Our **constituencies**, from the communities we serve to our partners in the business, government and nonprofit sectors, are becoming increasingly diverse. We need to understand and reflect this rich variety of **perspectives** in order to achieve greater impact.

Advancing diversity, equity, and inclusion is hard, but leaders in philanthropy have a track record of tackling many of our country's toughest challenges—and we again have an opportunity to lead the way.

To meet this challenge, philanthropic, community, and thought leaders are all coming together in an ambitious effort. We are a growing collaboration of foundations large and small, individual donors, regional and national associations, and organizations that focus on diverse communities. Together, we are a powerful, national network with the potential to impact philanthropy at every level.

>> Speaks to a universal value that can connect to all foundations.

>> “Grantmaking” includes equity concept in a tangible way.

>> Uses “our constituencies” to make diversity relevant to all foundations.

>> Connects diversity—often seen as a tired issue—to current context.

>> Acknowledges that it's a difficult issue but that philanthropy is capable of rising to the challenge.

>> Showcases the variety of those involved so everyone can see themselves as part of the effort.

>> Highlights the synergy of this powerful combination.

We are part of a **growing movement** in philanthropy to ensure that those who have been historically excluded—women, people of color, people with disabilities, and the LGBT community—are at the decision-making table and reflected in our portfolios. We are working to:

- Recruit diverse leaders for foundations—including CEO, staff, and trustees;
- Identify the best actions we can take in our organizations to advance diversity, equity, and inclusion;
- Increase funding for diverse communities and ensure that foundations offer all constituencies equal opportunity to access the resources they need;
- Improve data collection and transparency so we can measure progress.

By bringing **new voices and expertise** to the table, we have the potential to make our foundations more **effective** at advancing the common good. Diversity and inclusion can help our foundations better identify creative solutions to our internal challenges, and those faced by the communities we serve. And thinking about equity in our grantmaking can help us create **opportunities** for all communities to thrive.

How can greater diversity, equity, and inclusion in your foundation and funding portfolio enhance your impact? Commit to an action plan for your foundation’s hiring, grantmaking, or data collection.

Go to D5coalition.org for ideas and inspiration.

>> Packages key goals for the field succinctly.

>> Shows the tangible benefits of “new voices and expertise,” which audiences found motivating.

>> Uses the word “effective” because it tests well—and is modified by “potential” to avoid overpromising.

>> Defines “equity” in terms of opportunity, which is more readily understood and supported.

>> Acknowledges that foundations are in different places and different aspects are more relevant to them than others.

>> Focuses on a simple call to action that provides leaders with a clear point of focus.

ONE MINUTE MESSAGE

This is a concise version of our message that can be used as a brief introduction to our work and can be spoken in about a minute.

Philanthropists seek to promote the common good. Advancing diversity, equity, and inclusion in our organizations and grantmaking helps us live up to our values and achieve greater impact.

Our constituencies and our partners are becoming more diverse. We need to reflect these perspectives to be effective.

This is hard work, but philanthropy has a track record of tackling tough challenges—and we again have an opportunity to lead the way.

We are a growing movement in philanthropy striving to ensure that those who have been historically excluded are at the decision-making table and reflected in our portfolios. By bringing new voices and expertise to the table, we can make our foundations more effective.

We've got four big goals: recruit diverse leaders; inspire foundations to take action; increase funding for diverse communities; and improve data collection to measure our progress.

How can greater diversity, equity, and inclusion benefit your foundation? Commit to an action plan. Go to D5coalition.org for ideas and inspiration.

IMPACT STORY TEMPLATE

Stories put our work into human terms and make it come alive. Sharing stories in a variety of contexts—in everyday conversations, presentations, and on websites—will make our message more meaningful. Telling foundation leaders stories about others who have taken action to advance DEI helps them understand how this effort can increase effectiveness.

The following template may be helpful in crafting stories about how your foundation, or one you are familiar with, has taken steps to advance DEI. It asks a series of questions aimed at structuring a story about impact—demonstrating how DEI can help foundations better achieve their missions.

Describe the foundation who chose to advance DEI: Where do they work? What is their mission?

What aspect of DEI did they choose to work on?

Why did they think this was important to do?

How did they do it? (Did they use any specific resources? Did they establish a specific process?)

How did this impact staff?

How did it impact grantees?

How did it help them better achieve their mission?

SAMPLE IMPACT STORY

This sample story explains why a family foundation chose to diversify its board of trustees—and how they successfully invited new perspectives to the table.

The Surdna Foundation is one of the country's oldest family foundations. It is dedicated to fostering sustainable communities in the United States, and seeks to advance social justice, healthy environments, and thriving economies and cultures. Diversity and inclusion are important values to Surdna—but it can often be challenging to advance these ideas in a family foundation because leadership often remains within the control of the founding family.

In 2010, Surdna saw an opportunity to live out its public commitment to diversity and inclusion when three nonfamily trustees rotated off the board. The replacement directors needed to match their predecessors in passion and insight, and they had to prove they could effectively handle the Surdna mission of fostering just and sustainable communities.

Surdna worked with an executive search firm to broaden the scope of its pool of candidates beyond its existing professional networks. The search firm assembled a list of candidates based on diversity of experiences and expertise and—in a four-month process—the Surdna board selected three new leaders.

This rigorous approach ensured that Surdna had more diverse perspectives around the table to help solve tough problems. It also helped Surdna live up to its social justice mission—and more effectively carry it out.



JOHN EMORY ANDRUS, FOUNDER

LESSONS-LEARNED STORY TEMPLATE

Research found that starting a conversation with a story about a mistake that you made in your own efforts to advance DEI—and how you learned from it—can make other people feel more comfortable taking the first step. Advancing DEI can be a challenge, and it's important to know that others have made mistakes along the way, and overcome them.

The following template may be helpful in telling a story about learning from a mistake.

Describe the goal you were trying to achieve: Where were you working? Why did you set that goal? What impact did you envision?

What aspect of DEI did that goal relate to, and why was that important to you or your organization?

What did you do to achieve that goal? Were there any challenges?

When did you realize you had made a mistake? How did that make you feel? Describe how your mistake impacted you, your peers, and your institution.

How did you respond to making a mistake?

What lesson did you learn? How has that affected your work today?

SAMPLE LESSONS-LEARNED STORY

This sample story illustrates how Kelly Brown, the Director of D5, learned from a mistake she made as a young professional.

Early in my career, I worked for a small foundation in the Bay Area. One of my biggest responsibilities there was to organize a tour of local organizations for visiting funders, board members, and other key stakeholders, to demonstrate the impact of our foundation and grantees. I spent a lot of time ensuring that the day would go perfectly, and showcased our impact in diverse communities.

When the day finally came, our group piled into a bus and embarked on our Bay Area tour—visiting organizations that served a variety of different constituencies. We concluded our tour in an auditorium, where everyone congregated to enjoy a meal and reflect on the day’s events. I stepped onto the stage glowing with pride at our success—feeling certain that everyone had enjoyed their experience and felt that their diverse interests had helped shape the event.

Then a man in a wheel chair moved toward the center of the room and announced, “I have something to say.” I welcomed his feedback, expecting nothing but praise. He declared that he had felt completely excluded from the entire experience: When the rest of us boarded the bus, he had to arrange his own transport to trail the rest of the group; when we visited each organization, he had to wait outside because the venues were not accessible. He could neither hear nor contribute to our conversations. He was a long-time activist on many of the issues we discussed—and we had left him out.

I was mortified. I had thought very carefully about including diverse groups in our tour—but I had overlooked one that was not directly connected to me. In doing so, I had not only disappointed the man who spoke to me that day, but other people with disabilities who are extremely important parts of my life. But that excruciating experience made me a better grantmaker. Adding these voices to our process and analysis uncovered gaps in the work of many good organizations—and by pushing these organizations to address their gaps, we helped them become more effective.



Q&A

These are answers to frequently asked questions about diversity, equity, and inclusion.

How is DEI relevant to my mission?

Think about all of the people involved in the issues you focus on—and think about all the aspects of diversity.

Are there people in the community you serve that have unique needs? For example, if your mission is to advance the arts in your community, are there people with disabilities who could be better served by your efforts? For instance, is their perspective represented on your board? Are your events accessible?

Even if DEI doesn't seem immediately relevant to your niche, thinking about the specific, diverse needs of your community can help you be more effective and better achieve your mission.

How do I know this will improve my effectiveness?

Good question. It's hard to quantify the outcomes, and right now, some of the brightest minds in the field are working to conduct research and gather the data to prove the case definitively. But there are two main ways that it can enhance your effectiveness:

First, diversity and inclusion fuel innovation. Having a variety of voices at the table will help you better identify real-world solutions, informed by the people they are intended to serve. In a Forbes Magazine study of major corporations, 85% of managers agreed that diversity is crucial to innovation.

Second, by taking equity into account in our grantmaking strategies, we help create opportunities for people in every corner of our constituencies and deepen our impact.

Where can I find a pipeline of talent?

There are many resources in the philanthropic field that can help you connect to networks of diverse leaders.

Check out D5coalition.org, where there is a wealth of resources you can draw upon—from philanthropic associations that represent diverse communities to HR tools to listings of peer foundations you can talk to.

How do I approach this issue if my staff are uncomfortable discussing it?

Show your team that you are willing to create a safe space to talk about these issues.

One powerful thing many philanthropic leaders have done is to share their own stories about mistakes they have made in this area—like a community they overlooked inadvertently—and what they learned from it. Those kinds of stories make everyone feel comfortable talking about this in a less guarded way.

It's also helpful to ensure that everyone—at all staff levels—feels included by inviting them to participate in the conversation.

If I choose to take this on, how do I measure success?

It's not easy, but you'll need to set your own measure of success.

There is no single gold standard. For example, many foundations have set a goal to ensure that staff and boards reflect the demographics of their communities proportionally. Others have created specific population focused funds to serve a specific segment of their constituency.

However you do it, you should see each accomplishment as a milestone to celebrate.

What is your position on legislation that requires foundations to implement specific DEI policies and practices?

We are focused on encouraging foundations to take voluntary action to advance diversity, equity, and inclusion.

We don't take positions on legislation, but we believe philanthropy has been successful in tackling some of the nation's biggest problems effectively, without outside intervention. And the more philanthropy is able to do on its own, the less those pushing for legislation will feel it's necessary.

I want to advance diversity, equity, and inclusion in my organization. How do I do it? [Note: Two possible answers have been provided below. The second option will be most useful for a champion with deep knowledge of DEI.]

1. Organizational change starts with aligning your staff around your priorities through meaningful conversations—and continues through the implementation of policies and practices that affect hiring, grantmaking and data collection.

Many foundations have successfully made changes in some or all of these areas, and have useful knowledge to share. Contact D5 to connect to other leaders working towards common goals so you can learn from their stories and share some of your own.

2. What aspect of DEI do you think is most important for your organization to address?

Let me tell you about how another foundation tackled that same challenge...

Current data shows that philanthropy is behind on diversity. Why is that?

While the current data could be accurate, there is a good chance it's not fully capturing the impact of philanthropic dollars on diverse communities.

As we know, it's hard to accurately track whom we are serving. For example, if you give a grant to the NAACP and to the YMCA—both on the South Side of Chicago—only one of your grants might get counted as serving diverse communities. While it is important for foundations to continue advancing diversity, equity, and inclusion, it's equally important that we find an effective and comprehensive way to measure our progress.

How does collecting and reporting data on internal diversity and grantmaking benefit my foundation?

Being transparent about who we work with and who we serve signals to the field that we value diversity and want to attract employees who share that value and motivate others to advance it.

Being transparent about who is on our staff and boards is a way to show people that we take diversity and inclusion seriously. New staff will only want to join our team if they can see themselves as part of it.

And collecting and reporting data on our staff and grantmaking can also motivate our peers to keep up. We often measure our success in comparison to the success of our peers—so sharing data with the field can encourage others to tout their own impact metrics, and can increase the accountability and transparency of our work.

How can we create an organization that is more welcoming to others?

First, be transparent about who works at your organization. Second, highlight your values. If you value diversity, equity, and inclusion make a statement on your website and in your grantmaking.



For more information on advancing diversity, equity, and inclusion, please visit www.D5coalition.org.