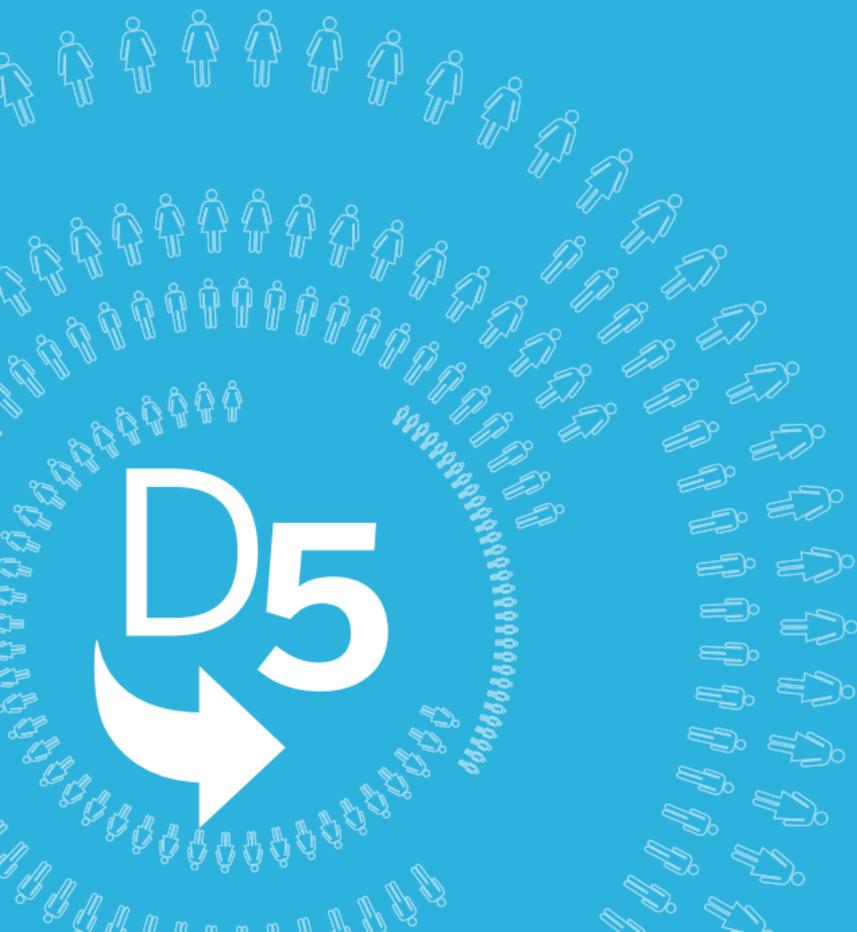


TAKE⁵ FOR



As a Take 5 Champion, you can help advance diversity, equity, and inclusion (DEI) in philanthropy by asking your colleagues to take action within their organizations. Your commitment to sitting down with leaders in the field and working with them to identify next steps is one of the most effective ways we can create change. **Thank you!**



YOU DON'T NEED TO BE AN EXPERT

To be an effective messenger, you just have to be committed to advancing DEI—whether you're a foundation CEO or a staff member of a regional association. You don't have to know the best way to implement every practice, or be aware of every resource.

This booklet provides guidance and ideas, but a more complete list of resources and actions can be found on our website: D5Coalition.org. And if you don't know the answer to a question that gets asked, refer that person to us (contact Hafizah Omar at homar@d5coalition.org) and we'll connect her or him to someone who can answer it.



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 Hafizah Omar at homar@d5coalition.org.



GUIDING QUESTIONS

1

Build on Success

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

2

Identify Challenges

Where have you had difficulty in terms of advancing DEI?

3

Create a Plan to Tackle Them

How can you get around these challenges? What would you need to do first?

4

Offer Assistance

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

5

Ask for a Commitment & Recap

What do you think your organization could commit to do? What's the next step to move this forward?



KEY MESSAGES ABOUT THE BENEFITS OF DEI TO FOUNDATIONS

Advance the common good & achieve greater impact

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.



Keep up with your changing constituencies

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



Increase your effectiveness

By bringing new voices and expertise to the table, we can make our foundations more effective.



TELLING STORIES TO INSPIRE ACTION

Research has identified two kinds of stories that help motivate people to take action on DEI. One helps drive the theme of effectiveness. The other can make people feel more comfortable about tackling a tough issue.

- **Increasing effectiveness**

Tell a foundation leader a story based on your own experience advancing DEI—or the experience of someone you know—and how the work you did improved the effectiveness of your foundation.

- **Learning from mistakes**

Leaders are often uncomfortable taking on DEI because it can imply that they have not done enough already or that they've made a "mistake" in leaving a community out. You can make advancing DEI seem less daunting by sharing a story about a mistake you made—a community you had once not included, or an experience about DEI that didn't go well—and what you learned from it.



Scan this QR code to download a copy of this guide to your smartphone and always be prepared to have a conversation about DEI!

www.d5coalition.org

